Employee Resource Information Center

Onboarding System User Manual

Last Updated 12/17/2012

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Purpose of The Onboarding System

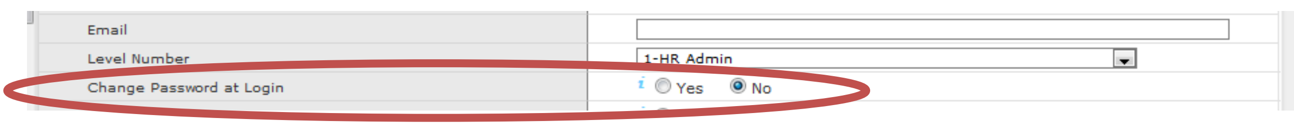
The purpose of the Onboarding system is to allow new employees the convenience of filling out their new hire paperwork online, at their own pace as early as one day after the acceptance of the job offer.

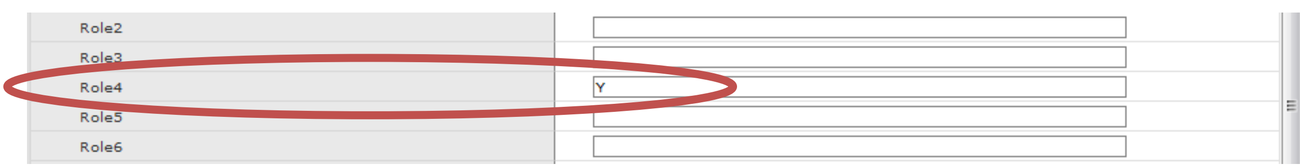
There are two tours that include required paperwork such as the W4, I-9 and Policy agreements. You may view the Onboarding process map on the Employee Gateway to visualize this process.

Onboarding New User Setup

To set up a new user in Onboarding the Admin Level and Role 4 in the details of the User need to be updated by a supervisor.

- Go to Admin Tools on the Employee Gateway (If you do not see Admin tools, ask a site administrator to access this menu.)
- Locate the User to be updated by searching by name. All ERIC staff should have two userIDs, one based on their EIN and one base on the name. The EIN accounts are for their personal use and will show your name in all CAPS. The name-based, or admin, accounts are for use at ERIC and will show your name in mixed-case letters.
- If no account has been set up, ask a site administrator to create a new Admin user.
- Open the user details by clicking on the Name of the user with the name-based UserID. On the list of details (right panel) change the Level Number to 1-HR Admin and Role 4 to "Y". 9Role 4 is found towards the end of the Employee Information section.





- Changing the Level Number to 1-Admin and Role 4 to Y should allow the user to see the Onboarding Tools on the Gateway homepage in the Tools section.

E-Verify New User Setup

ERIC Onboarding staff needs to have E-Verify access in order to fully complete the Onboarding process. The steps to complete this are:

- New user must first complete the E-Verify training module.

- Onboarding supervisor will setup a user account with E-Verify and assign the new user a user id and password
- Onboarding supervisor will then send notification to Enwisen with the new user's Admin User ID for the Employee Gateway as well as the new user's E-Verify user ID and email address
- Enwisen will set up access in the Onboarding system so that the new user can conduct the E-Verify process through the Onboarding product (I-9 Verification Status screen). This process can take up to a week.

How Is The Onboarding Process Initiated?

In the most basic terms: a recruiter will enter a placement, either through a recruitment or a direct hire. By clicking a box in this placement, the recruiter will send the job offer to the prospective employee's job seeker account on the State Jobs website (statejobs.utah.gov). Once the job offer is accepted by the candidate, the Employee Identification Number (EIN) is issued to the employee in HRE and the Onboarding Welcome email is sent the next day to the employee's personal email address. We consider the Onboarding process initiated when the employee accepts the offer online.

Manual Hire vs Online Hire

Almost all newly hired state employees have applied for and accepted a position with the state online but there are some instances where an incumbent is offered a position and is not able to use the Onboarding system to complete the required new hire paperwork. We refer to these individuals as manual hires, because they must be entered into the system manually by ERIC staff. See the following definitions:

- **Manual Hire:**
  - Individual is hired and paperwork is processed manually instead of via the online Onboarding system, either because the agency does not have the proper resources available to the incumbent or the recruiter has simply made arrangements for the Employee Resource Information Center (ERIC) to process the paperwork manually. The employee will fill out on paper the same documents other new hires will fill out online.
  - The responsibility for providing the necessary new hire paperwork falls to the recruiter, who then sends the completed new hire packet to the (ERIC), to be entered into the system by ERIC staff.
  - Completed forms must be scanned into the employee's personnel file online (HR Docs) and the HRE action is generated manually.
  - This is not to be confused with *direct hires*.

- **Online Hire**:
  - Individual is hired through the recruitment process (direct or competitive). See Who Initiates the Onboarding Process on page 4.

- New hire paperwork is completed online through the Onboarding system.
- Completed forms are automatically uploaded into the new employee's personnel file online (HR Docs).
- Most new employees use this process but there are some exceptions.

Who To Call

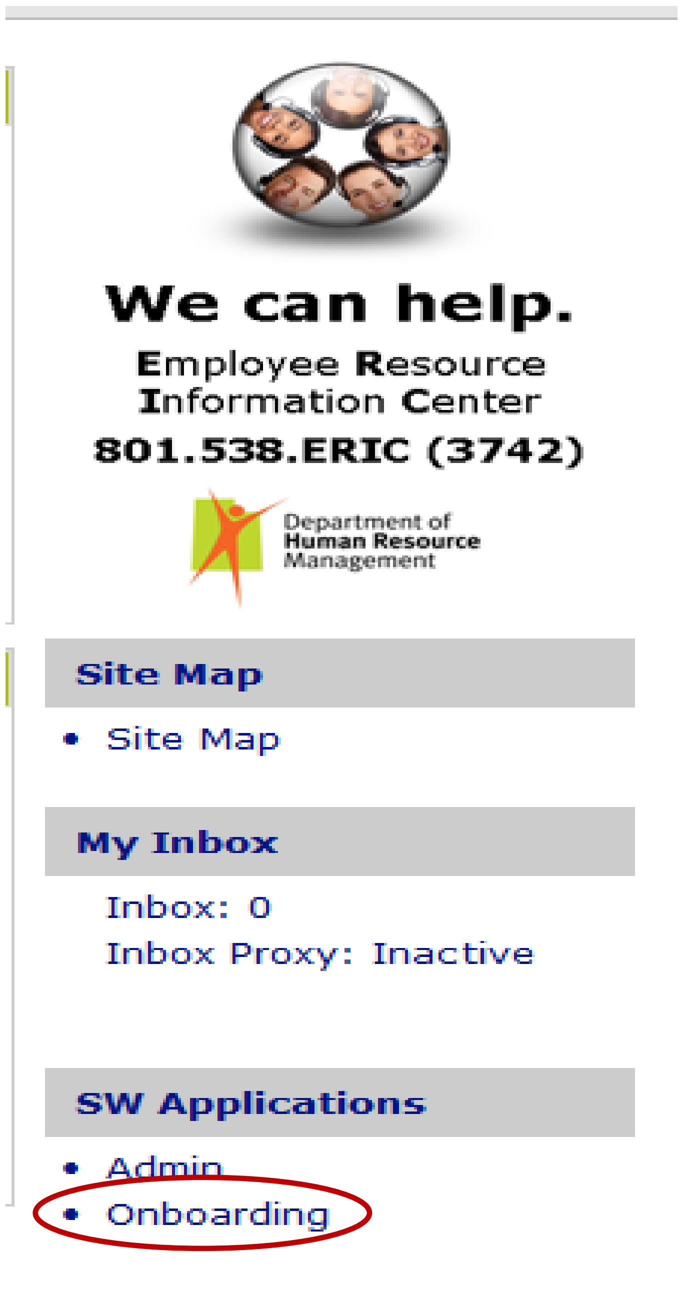
The following list may be helpful when deciding who to contact during each part of the process:

- Job offer – Sent by the recruiter through the placement
- I-9 Approver identified – Designated by the recruiter when the placement is created
- I-9 approval – Completed by the designated approver set up at placement
- Onboarding notification email – Auto-generated and sent the following day once the offer has been accepted by the applicant
- Onboarding Tours – Completed by the applicant and monitored by the assigned ERIC Onboarding technician
- E-Verify – Completed by the assigned ERIC Onboarding Technician
- HRE Action – Auto-generated through nightly data feeds, this information is verified and submitted for approval by the assigned ERIC Technician
- HRE Action Approval – Intake/Onboarding Lead is responsible for action approval, the Customer Service Supervisor is the back-up for approvals
- PDFs / HR Docs – The export function of the Onboarding system automatically loads the selected Onboarding PDFs needed for HR Docs but the assigned ERIC Onboarding technician must verify they have been loaded to HR Docs
- Archiving of Tours – Completed by the assigned ERIC Onboarding Technician

Logging Into the Onboarding System

To log into the Onboarding system, you must first be logged into the Employee Gateway in your admin (mixed case) account.

The Onboarding link will be listed in the right side menu of your Gateway homepage, under SW Applications. If you do not see the link, please notify your supervisor.



Dashboard – Onboarding Navigation Menu

The dashboard allows navigation of the Onboarding system. See below for descriptions of each screen in the Onboarding application, found in the menu bar along the left side of your screen.

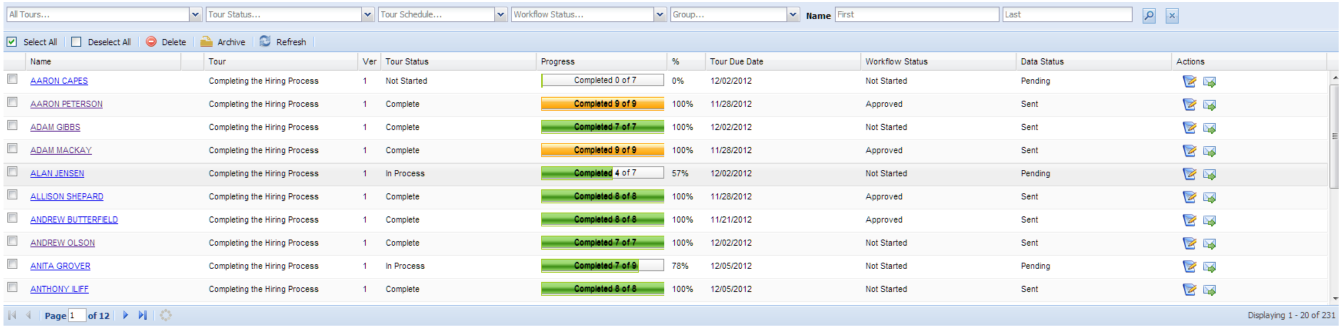
Views

1. Admin Dash

This screen displays graphs showing Tours in Process, Tours Not Started, and a line graph showing the number of New Hires Starting over the next month. Concerning the Tour graphs:

- Green - tours are being completed "On Time", within the due date timeline
- Yellow - tours being completed are "At Risk", or they are close to the due date
- Red - tours being completed are "Past Due", meaning they have not been completed by their due date.

2. Admin Console



All Tours... | Tour Status... | Tour Schedule... | Workflow Status... | Group... | **Name** First | Last

Select All | Deselect All | Delete | Archive | Refresh

Name	Tour	Ver	Tour Status	Progress	%	Tour Due Date	Workflow Status	Data Status	Actions
AARON CAPES	Completing the Hiring Process	1	Not Started	Completed 0 of 7	0%	12/02/2012	Not Started	Pending	
AARON PETERSON	Completing the Hiring Process	1	Complete	Completed 9 of 9	100%	11/28/2012	Approved	Sent	
ADAM GIBBS	Completing the Hiring Process	1	Complete	Completed 7 of 7	100%	12/02/2012	Not Started	Sent	
ADAM MACKAY	Completing the Hiring Process	1	Complete	Completed 9 of 9	100%	11/28/2012	Approved	Sent	
ALAN JENSEN	Completing the Hiring Process	1	In Process	Completed 4 of 7	57%	12/02/2012	Not Started	Pending	
ALLISON SHEPARD	Completing the Hiring Process	1	Complete	Completed 8 of 8	100%	11/28/2012	Approved	Sent	
ANDREW BUTTERFIELD	Completing the Hiring Process	1	Complete	Completed 8 of 8	100%	11/21/2012	Approved	Sent	
ANDREW OLSON	Completing the Hiring Process	1	Complete	Completed 7 of 7	100%	12/02/2012	Not Started	Sent	
ANITA GROVER	Completing the Hiring Process	1	In Process	Completed 7 of 9	78%	12/05/2012	Not Started	Pending	
ANTHONY ILIFF	Completing the Hiring Process	1	Complete	Completed 8 of 8	100%	12/05/2012	Not Started	Sent	

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- The Admin Console is split into two boxes. The upper box lists all non-archived new hires and the progress of their tours. You may use the drop down boxes lining the screen to search by Tour, Tour Status (Not Started, In Process, Complete), Tour Schedule (on time, at risk, past due), and Workflow Status (this is the I-9 approval status – Not Started, In Process, Approved). The Group drop-down currently does not have a listing to search. You may also search by First Name and Last Name of employee.
- Displayed in the upper box:
  - Name of the new hire
    - Tour - each employee should have 2 tours: Tour 1 “Completing the Hiring Process” and Tour 2 “Welcome to State Employment”
    - Tour Status- Started, Not Started, In Process
    - Progress - shows how many steps have or have not been completed
    - % - the percentage of the tour completed
    - Tour Due Date - Tour 1 is due 2 days after start date, Tour 2 is due 5 days after start date
    - Workflow Status (status of I-9 Approval) – Not Started, In Process, Approved
    - Data Status - Pending or Sent. This will say “Sent” if the information filled out has been sent to Enwisen/HRE. It will say “Pending” if the tour has not been started or if they just completed the tour that day. The data has to update to Enwisen overnight, so it won’t say “Sent” until the day after the employee completed it.
    - Actions - post a comment on the employee’s tour or send an email to the employee
- The lower box displays the individual tour and the forms associated with that tour. Simply click on the underlined name next to the tour you want to view and the lower box will populate with the steps of that tour. If the step has been completed then you will be able to open the form by clicking on the underlined name of the form. If the step has not been completed you will not be able to open the form to view.
- For more information about what is contained in each tour, see the section titled Tour 1 and Tour 2 on page 15.

3. My Inbox

This screen is used by I-9 approvers. The Received tab will display the I-9s that are ready for approval. The Sent tab displays I-9s that have been approved or sent to the ERIC for approval.

4. Pending Questions

This screen displays questions submitted while the new hire completes the Onboarding tours, via the Ask A Question button in the top right corner of the employee's Onboarding screen. This is generally monitored by the Onboarding Lead.

5. Q & A Board

This screen displays all the questions that have been acknowledged and answered on the Pending Questions tab. The drop down boxes can be used to filter the list if you are searching for a specific question that had been answered.

6. Archives

This screen looks and is used the same as the Admin Console, but these employees have been archived. The upper section displays all the tours that have been archived, while the lower will list the steps of the tour you click to view. The drop down boxes can be used to search for a specific employee's tours. To un-archive a tour, click the box to the left of the employee's and click Undo Archive.

7. Analytics & Reports

This screen tracks the analytics or data within the Onboarding process. The Reports feature allows the exporting of data directly from the Onboarding system for analysis.

8. I9 Verification Status

This screen displays the I-9s that have been completed and approved by the assigned I-9 approver. Once the I-9 approver has completed the required sections, saved it and submitted it for approval, it will appear in this I-9 Verification Status Dashboard. This means it is ready to be submitted to E-Verify by an ERIC staff member.

- To search for a specific new hire's submitted I-9, enter the employee's name in the User Name field at the top then click the button that looks like a magnifying glass or hit enter on your keyboard. You may also use the drop down field at the top labeled E-Verify Eligibility Status, or the field labeled Originator to search for an I-9 that you have already submitted to E-Verify but have not been able to close.

The information displayed:

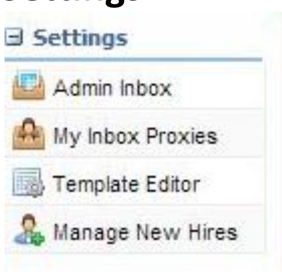
- Name: Employee's Name
- Last Updated: Date the I-9 was last updated
- Submission Status: One of the following - Returned to DHS (Dept. of Homeland Security) data correction, Pending Initial Submission, Required input field, etc.
- E-Verify Eligibility Status: This field will be blank if the I-9 has not been submitted to E-Verify yet or if it has not been closed. If it has been submitted to E-Verify but the form is incomplete, it will show Case Incomplete. If the system requires a passport for photo matching, it will show

Photo Matching Required. If there is an error it will show SSA or DHS Tentative Non-confirmation.

- **Respond**: Initially there will be two options given, Submit to E-Verify and Return to Workflow. When you submit the I-9 to E-Verify and there are no problems, it will give you the option to Close the E-Verify case.
- **Start Date**: New employee's start date
- **Originator**: This field will populate with the name of the ERIC staff that has either submitted the I-9 to E-Verify or returned to workflow for correction. Once a staff member's name is listed there, only that staff member will be able to complete the E-Verify case.
- **Actions**: Post a message, send an email to the employee, view the E-Verify history, open the I-9 form, or view the case details.

**Please see the E-Verify section of this manual for specific details on how to complete an E-Verify.

Settings



1.   Admin Inbox

This screen displays all current new hire I-9s awaiting approval from the assigned I-9 approver. Viewing an I-9 from this screen, by clicking I9 Verify Final, will show you exactly what an I-9 approver sees.

2.   My Inbox Proxies

This screen allows I-9 approvers to set up back-up I-9 approvers for when the original I-9 approver is unable to complete his portion of the document. The assigned proxy user(s) will see all I-9s in the original I-9 approver's inbox.

To add a proxy: Search for the intended I-9 approver proxy by entering the first name, last name, or email address in the Assigned Proxy field. Select the correct person from the options that populate. Then select a start date and expire date – the proxy will only be able to see your assigned I-9s between these two dates. You must enter at least a full day. For example, you choose 1/1/12 as your start date. The expire date cannot be 1/1/12; it must be at least 1/2/12. You may also add a reason to remind yourself why they need proxy access (i.e. "John Doe I-9"). Then click Add in the bottom right corner.

To remove an existing proxy, check the box to the left of the proxy's name, and click Remove.

3. Template Editor

This option is for Admin use only, it allows an authorized person to edit the templates for the Benefits Standard, Form I-9 SSA Correction, Form I-9 DHS Correction emails generated form the Onboarding system.

4. Manage New Hires

The left panel displays all new hires who have gone through the Onboarding process. It displays:

- User ID (EIN)
- User Name (Employee Name)
- Start Date
- Tours - You will see a 0, 1, or 2, indicating how many tours have been completed so far. To search this list, enter the EIN or name of the employee.

To see the employee's Onboarding profile, click on the name of the employee. The right side panel will populate with 5 tabs: Profile, Other, Reset Password, Groups, and Tours.

Profile:

This tab includes the new employee's account information (EIN, full name, email), personal information (gender, birthdate, social security number, address, phone number), start date, hire date, and base date.

There is also an Update, Delete, and Send Welcome Email button in the bottom right corner of the screen. Use the Update button if you have changed or added any information to the profile. Delete an employee's Onboarding record when a rehire has already been through onboarding and needs to come through a second time (this will ensure that the updated information comes through the system). Clicking Send Welcome Email will resend the Welcome Email to the email address listed. First verify the email address is correct, then click this button. Sometimes it is necessary to use this when a new hire tries to log into Onboarding but the system says the login is invalid or has expired.

Other:

This tab includes additional information about the employee's new position. At a quick glance you can see the Hiring Manager, Recruiter, and I-9 Approver as well as if the employee is required to fill out a BCI through Onboarding, what the employee's overtime selection is (FLSA: Compensatory Leave or Monetary Payment), and if the employee is benefitted.

Reset Password:

If an employee is having trouble logging into the Onboarding tours, you can reset the employee's password here. Enter a new password, confirm the password, make sure the box to the right of Change the Password At Login is checked, and click Update Password in the bottom right corner of your screen. Keep in mind that the password field at login is case sensitive and have the employee open a new onboarding login screen and enter their User ID (EIN) and new password. Sometimes it is necessary to repeat this process a couple times.

Groups:

This tab shows coding pertaining to the employee's onboarding tours.

Tours:

View the progress of the employee's tours.

How New Hires Are Assigned

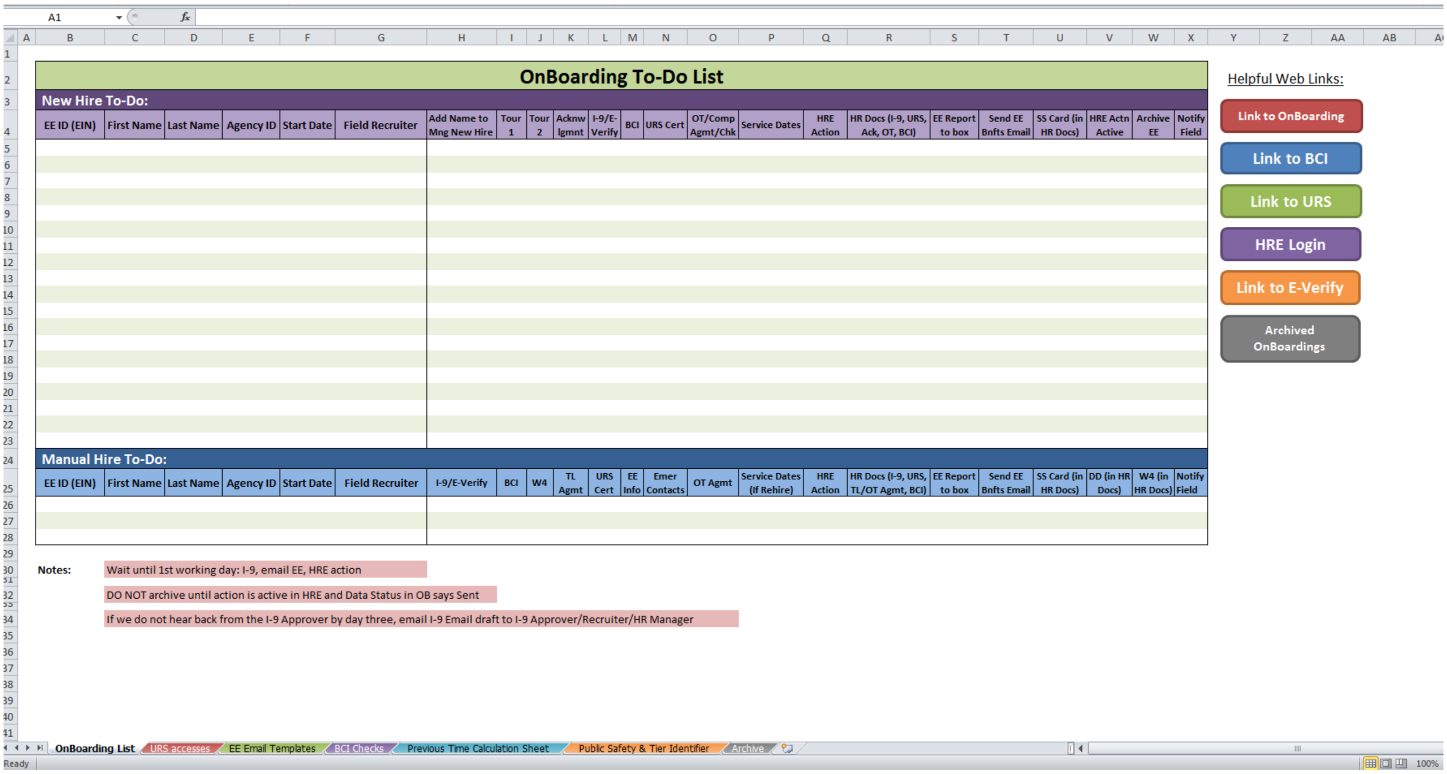
It is important to keep the workload balanced between ERIC Onboarding technicians. The current process for assigning all new Onboarding assignments is as follows:

- DTS personnel send an email to Onboarding@utah.gov, Onboarding lead, and supervisors, stating that the Excel spreadsheet with the new Onboarders for the day are ready to be viewed and sorted. This spreadsheet is found on the DATA shared drive.
- The Onboarding Lead finds the newly sent new hires on the Sent tab of the document titled StatusPorSTracking, under the current day and then finds them on the StatusPorS tab.
- All new new hires on StatusPorS tab are highlighted, and the rest are deleted.
- The lead will see who the last person was to be assigned an Onboarder on the Master New Hire list and begin making assignments to the ERIC technicians using alpha order.
- StatusPorSTracking document is saved under a new name in the ERIC drive as a daily document. A sample title would be "New Hires_June1".
- New new hire information is then copied from this daily document and pasted into the Master New Hire document.
- Master New Hire list document name is updated with the current date. A sample title would be "Master New Hires – As of June 1".
- Notify ERIC Onboarding technicians that the spreadsheet is ready for their use.

Tracking Your New Hires

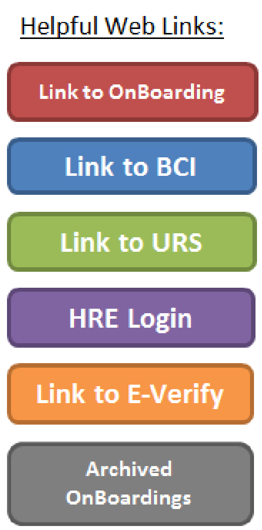
You may track your new hires any way that you are comfortable, as long as you are able to verify that all documents and information have been received and processed properly. ERIC personnel have come up with two options for tracking this progress that have proven useful.

The first of these options is an Excel spreadsheet. It is currently titled "Onboarding Workbook" and can be found on the ERIC Shared Drive. You can make any changes to this document to make it work for you. The template spreadsheet is explained below.



When new hires are assigned to you, transfer the information only for those new hires assigned to you from the Master New Hire List to your Onboarding Workbook.

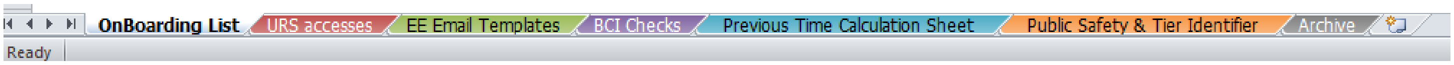
On the right side of the first screen, Onboarding List, you will see some helpful web links:



- Link to Onboarding system https://erc.enwisen.com/ASI/Page.aspx
- Link to BCI https://ucjis.ps.utah.gov
  - See instructions for conducting a background check on page 18
- Link to URS (Utah Retirement Systems) - https://www.urs.org (Employers Login)
  - See instructions for completing a URS Certification on page 36
- HRE Login https://hre.dhrm.utah.gov/hre/
- Link to E-verify https://e-verify.uscis.gov -
  - See instructions for completing a manual E-Verify on page 22

- Link to Archived Onboardings - Takes you to the Archive Tab at the bottom of the Excel document

Document tabs (bottom of the document)



Onboarding List

- Main list of your onboarding/manual hire employees still needing attention

URS Accesses

- Username and password for each agency for completing URS certifications online

EE Email Templates

- Benefitted and Non-benefitted emails sent to the new employee via email. Print and include if mailing certification to employee.

BCI Checks

- Instructions for conducting a BCI and a list showing who processes BCIs for each department, the ERIC the field HR

Previous Time Calculation Sheet

- To be used when updating an employee's service screen if they have previous time worked for the state
  - Fill in the start and end dates for BENEFITTED time only in the boxes provided.
  - Enter the current hire date (most recent hire date)
  - The document will automatically calculate what the Leave Accrual Date should be by adding up the days between the dates you entered and subtracting that amount from the current hire date
- Enter Leave Accrual Date on Service screen in HRE record

Public Safety & Tier Identifier

- List of Public Safety Positions per Agency. Double-click the document to view a readable version.
  - Shows the positions in each agency that could be eligible for a Public Safety retirement code
- Tier 1 vs. Tier 2 Decision Tree. Double-click the document to view a readable version.
  - Interactive PDF where you can enter the employee's information and it will help determine which retirement code to place the employee in

Archive

- Move employees to this part of the spreadsheet after the entire process is completed. This helps you keep a record of what you have done. Onboarding and Manual Hires are separated but, as mentioned before, you can make any changes needed to meet your personal preferences.

Paper Onboarding Checklist

Name: ______________________________

Start Date: __________________________

- o BCI with Authorization
- o Tour 1
- o Tour 2
- o E – Verify
- o URS Certification
- o HRE Action
- o Leave Accrual Adjusted (Rehire)
- o Send Benefits E-mail
- o Notify Field of Active Status
- o SS Card
- o HR Docs (Onboarding)
  - o I-9
  - o Acknowledge
  - o BCI
  - o OT
  - o URS Cert
  - o Statement of Ineligibility
- o Archive Tours
- o Delete Temporary Docs

The second option is a printable checklist listing each step in the Onboarding process for the ERIC technician. List the employee's name and start date at the top, and then check off each item as they are completed.

Tour 1 and Tour 2

Onboarding tours can be viewed in the Admin Console (see description of Admin Console on page 8). Find the employee in the console and click on the underlined name next to the tour you want to display. The lower box will then populate with the steps contained in the tour you have selected. If a step is complete in a tour there will be a green check mark to the left, under Step Status. You can view the completed form by clicking on the underlined step. Note that the step/form will not be underlined if it is not complete and you will not be able to view the form. Once you click on the step a window will open displaying the Onboarding version of that specific form. You may be given the option to Print, Open Form (as with the I-9), or Close the form. Information from these forms will be automatically uploaded to HRE and HR Docs.

Tour 1 - Completing the Hiring Process:

- **Governor's Message**: This is a message from the Governor to welcome the new employee to State employment and to introduce the Onboarding online module.
- **Personal Information**: Employee fills out personal information including address, phone number, and birth date.
- **Emergency Contact**: Employee enters a primary and secondary emergency contact.
- **I-9**: The employee completes section 1 of Form I-9; the I-9 approver completes section 2 and signs the bottom of the form. This is one place you can see the progress of the employee's I-9 and check that information is entered correctly.
- **W4**: Employee fills in W4 tax information. If the employee has chosen EXEMPT, they cannot have a number in the total withholding allowances field (or line 5 of the normal W4 form, which you can view by clicking Open Form). If the employee chose exempt and has a number in the withholding allowances field, please contact the employee to request they complete a W4 again by logging back into Onboarding.
- **Criminal History Check Authorization (BCI)**: *Will only appear if the recruiter has indicated in the placement that the employee needs a background check completed. The employee will fill out and sign this form, which authorizes the ERIC to complete a background check. You may complete a BCI check on the employee as soon as this step is finished, even if the rest of the tour is not yet completed. The goal is to have the background check complete and recruiter notified of the findings before the new employee begins work. Note that ERIC does not process all background checks. Instructions for completing a BCI check can be found on page 18.
- **Overtime Agreement**: *Will only appear for employees in FLSA Non-Exempt positions. FLSA exempt employees will not see this form included in their tour 1. In this step the employee will elect to accrue compensatory leave or monetary payment for hours worked in excess of 40. Note that some jobs and agencies require specific Overtime Agreement forms.
- **Employee Benefits**: *Will only appear if the employee is benefitted. This step gives a brief overview of the benefits the employee is eligible for and lists the Resources for the New State Employee website.
- **URS Statement of Ineligibility**: *Will only appear if the employee is non-benefitted. This form is the Utah Retirement Systems Statement of Ineligibility, used to notify URS that the individual works for the State of Utah but is not benefitted.
    - Section A – Employee Information And Classification
        - Auto-filled with the employee's information.
    - Section B – Defined Contribution – 401(k)/457
        - Employee will determine if he will participate in a 401k or 457 and choose YES or NO accordingly.

  - Section C – Employee Signature And Acknowledgement
- **What's Next**: The last step in Tour 1 explains what to expect in Tour 2 and when Tour 2 is expected to be completed. The employee MUST click the complete button on this page or Tour 1 will not show as completed.

Tour 2 – Welcome to State Employment:

- **Welcome to State Employment**: This step explains what to expect during Tour 2 and asks that the tour be completed within the first three days of employment. On the right is a video welcome message from Jeff Herring, Executive Director of the Department of Human Resource Management.

- **Confidentiality Agreement**: State of Utah employees may have access to private or confidential records. This agreement states the expectation of keeping private information confidential and acknowledges that the State of Utah has a policy regarding participation on personal blogs and social media sites. It mentions that there may be additional policies within the agency that must be followed.

- **Drug Free Workplace**: The State of Utah is a drug free workplace. This notification explains that employment may be terminated for violation of the State's substance abuse policy.

- **Acceptable Use of Technology Resources**: All State of Utah employees must comply with this policy, which explains what you can and cannot use state-owned technology for.

- **Workplace Harassment Prevention**: Workplace Harassment Prevention Policy and Procedure.

- **Political Activity**: Before engaging in partisan and non-partisan political activity, state employees must be familiar with the requirements of the federal Hatch Act and DHRM Rule.

- **Conflict of Interest/Outside Employment Declaration**: State policy requires that employment with the state be the principal vocation of full-time employees. This step explains that agencies may have additional policies in place regarding outside employment so an employee should consult with his supervisor if there are questions pertaining to how outside activities may conflict with state employment.

- **Acknowledgement Summary**: The employee will acknowledge each of the above policies by clicking the Acknowledge button as they go through each page. However, they officially acknowledge the policies by signing this agreement, which is later auto-loaded into HR Docs.

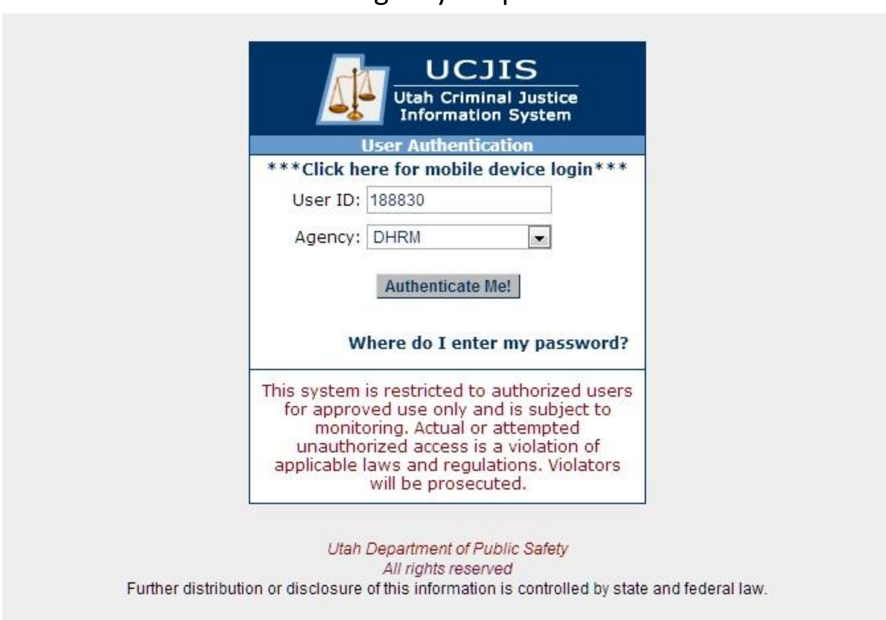
- **Your Pay**: This step consists of an explanation about when and how the employee will be paid and contains a link for more information and resources, including a pay period and holiday leave schedule, direct deposit form, etc.
- **Enrollment in State Benefits**: *Will only appear for benefitted employees. A brief explanation about enrolling in the benefits offered by the State.

- **Thank You**: The last step in Tour 2 explains that they have reached the end of the online onboarding process. It suggests that if they have any questions about their pay, benefits, or the employment standards explained in the onboarding module, to contact the ERIC via phone at 801-538-3742 or email to onboarding@utah.gov.

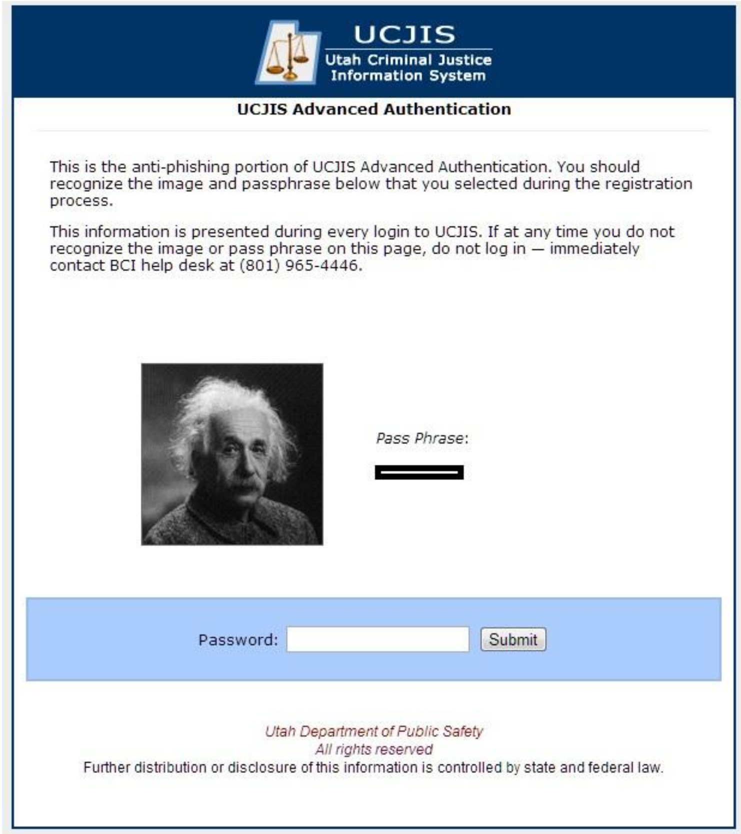
Completing the Background Check

Please make sure the employee has filled out the Criminal History Check Authorization (BCI Authorization) either online through Onboarding or via paper form received from the field office HR staff.

The BCI check will be completed on the UCJIS website: https://ucjis.ps.utah.gov. **NOTE**: when saving this in your bookmarks, make sure to use the https://ucjis.ps.utah.gov link and not the one your browser will show. Also do not click the back button on your internet browser to go back to a previous page; this will kick you out of the system. If you do not have access to UCJIS please contact your supervisor or Shannon Casias, the BCI TAC. You will see the following login screen. Enter you User ID (EIN) and type in DHRM or find DHRM in the agency drop-down box.

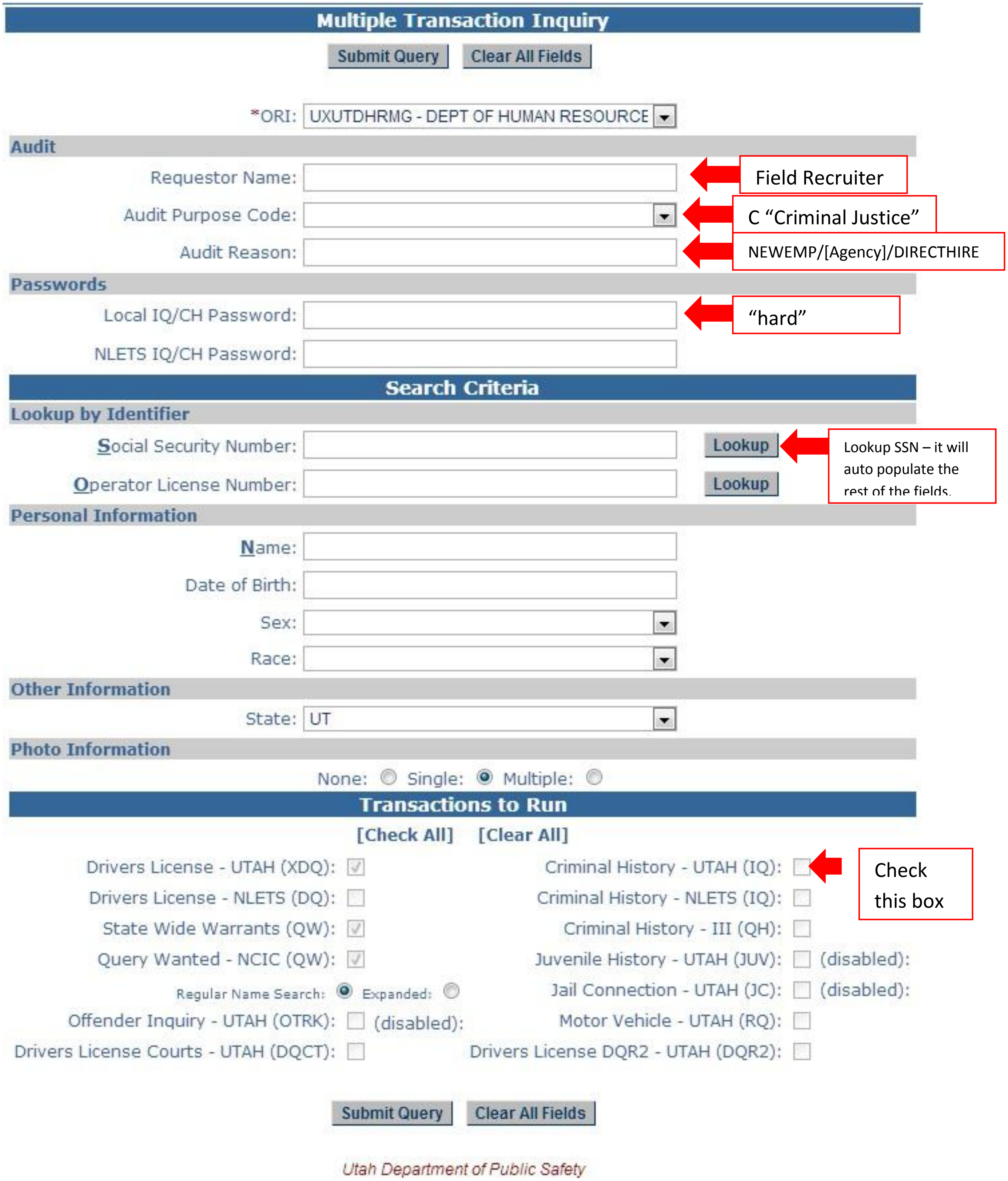


You will then be directed to verify the image you have chosen along with your pass phrase. Then enter your password.



Your next screen should be the UCJIS homepage. At the top of the page, you will need to enter transaction code MIL (Multiple Transaction Inquiry) and click Go.

Enter the information listed on the following screenshot of the MIL transaction:


Multiple Transaction Inquiry

Submit Query | Clear All Fields

*ORI: UXUTDHRMG - DEPT OF HUMAN RESOURCE

Audit

Requestor Name: — Field Recruiter

Audit Purpose Code: — C "Criminal Justice"

Audit Reason: — NEWEMP/[Agency]/DIRECTHIRE

Passwords

Local IQ/CH Password: — "hard"

NLETS IQ/CH Password:

Search Criteria

Lookup by Identifier

Social Security Number: Lookup — Lookup SSN – it will auto populate the rest of the fields.

Operator License Number: Lookup

Personal Information

Name:

Date of Birth:

Sex:

Race:

Other Information

State: UT

Photo Information

None: Single: Multiple:

Transactions to Run

[Check All] [Clear All]

Drivers License - UTAH (XDQ):

Drivers License - NLETS (DQ):

State Wide Warrants (QW):

Query Wanted - NCIC (QW):

Regular Name Search: Expanded:

Offender Inquiry - UTAH (OTRK): (disabled):

Drivers License Courts - UTAH (DQCT):

Criminal History - UTAH (IQ): — Check this box

Criminal History - NLETS (IQ):

Criminal History - III (QH):

Juvenile History - UTAH (JUV): (disabled):

Jail Connection - UTAH (JC): (disabled):

Motor Vehicle - UTAH (RQ):

Drivers License DQR2 - UTAH (DQR2):

Submit Query | Clear All Fields

Utah Department of Public Safety

*If the system does not find the employee it will not auto-populate the remaining fields after the SSN. You will need to enter the information yourself. For **Race** – select unknown.

Verify all information is correct before clicking Submit Query. It will take several seconds to load all 3 reports we use. Wait until each turns green and then click into each report to view.

If you get a “hit” (a record of arrest), follow these steps:

- Print the BCI hit information (right-click on your screen, select print; print the entire document)
- Contact the recruiter by phone and make sure they are available to immediately retrieve a fax of the BCI information you have printed. They must respond that they have received the fax when you send it.
- Fax the BCI to the recruiter
- To comply with BCI standards we must be able to visually verify that the BCI has been shredded. Do not store the BCI for any amount of time and do not put it in a shred bin. You must manually shred the BCI yourself; currently there is a shredder by the front receptionist desk.
- Wait to process the employee’s HRE record until the Recruiter tells you if the agency will continue with the hiring process for this employee

If you get no “hits,” email the Recruiter using the following template. Put “CONFIDENTIAL” in the subject line.

> Dear [Recruiter],
>
> I ran a BCI for [Name] – [EIN] and there were no hits.
>
> Thank you,
> [Your Name]

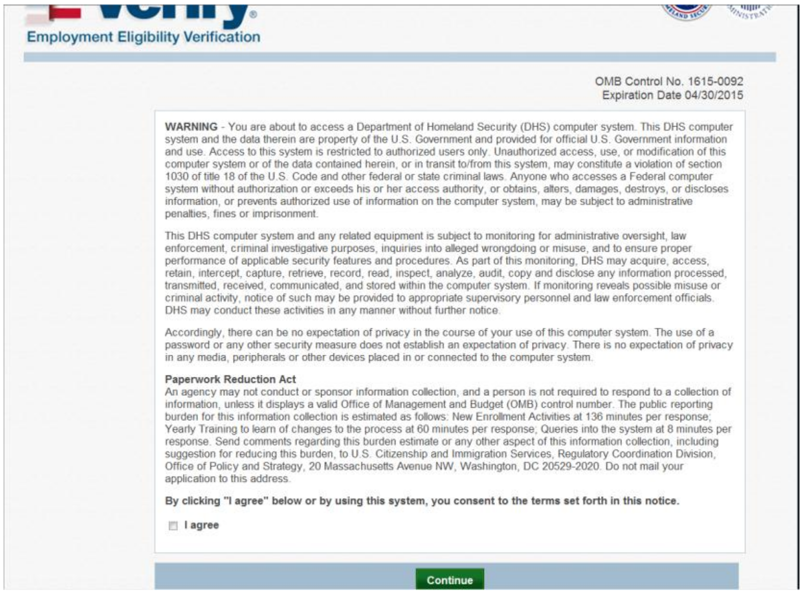
Submitting an E-verify

When to submit an I-9 to E-Verify

Any time paperwork is received for a new employee - whether it be through Onboarding or as a manual hire, no matter the agency, no matter the position – we must submit the E-Verify. I-9 procedure requires us to complete this within the first three (3) days of each employee's employment. Circumstances may not allow us to complete the E-Verify timely. If this happens, there is a space on the E-Verify submission for us to record the reason the E-Verify is late.

How To Submit E-Verify via E-Verify website

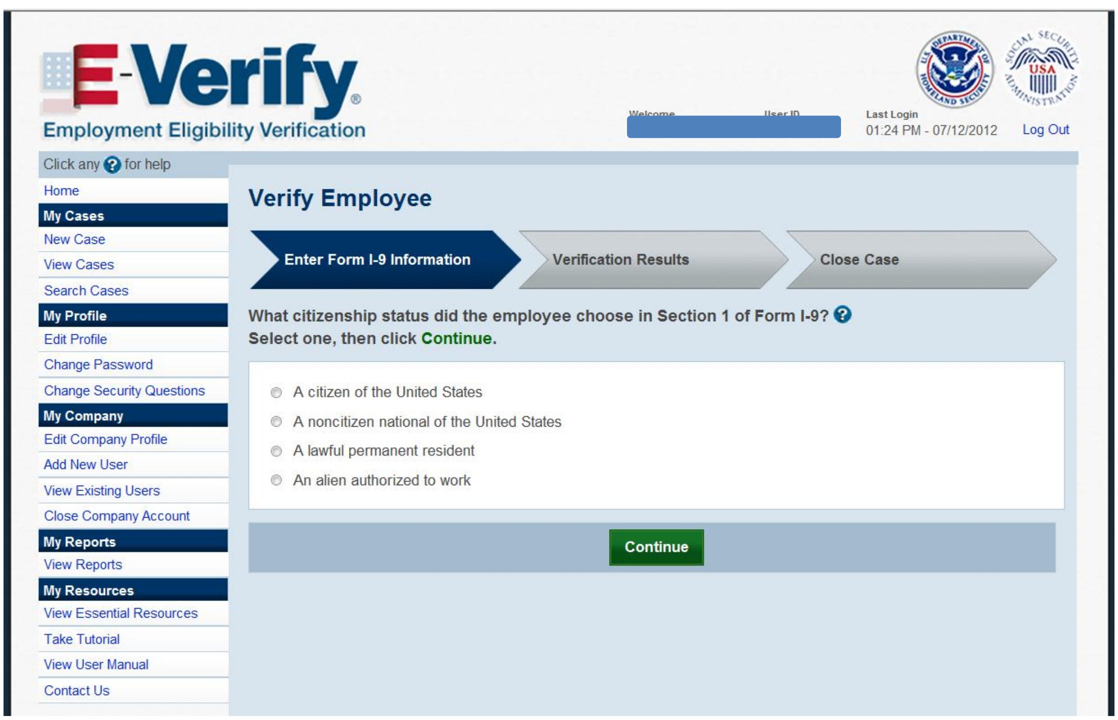
The E-Verify website is https://e-verify.uscis.gov/emp/vislogin.aspx?JS=YES. This is the first screen you will see. Agree to the terms and click Continue.



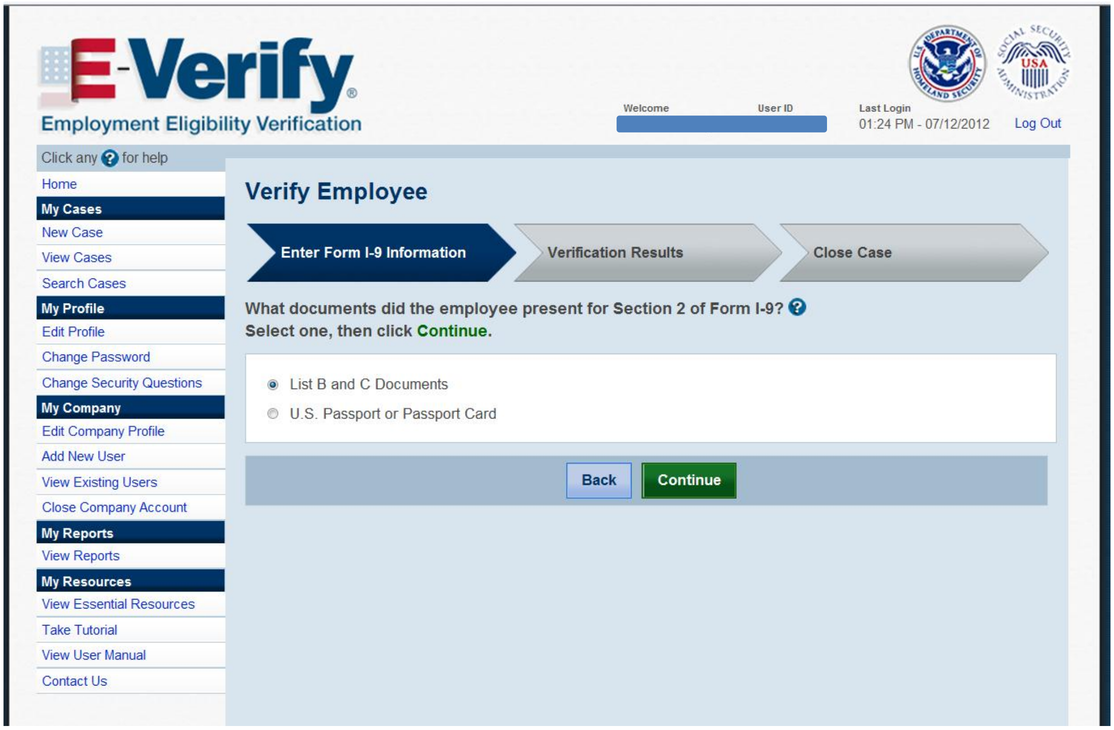
Sign in with the username and password issued to you by your supervisor.

When you reach the E-Verify homepage, click on the green button labeled Verify Employee or click the New Case link in the left-side menu under My Cases.

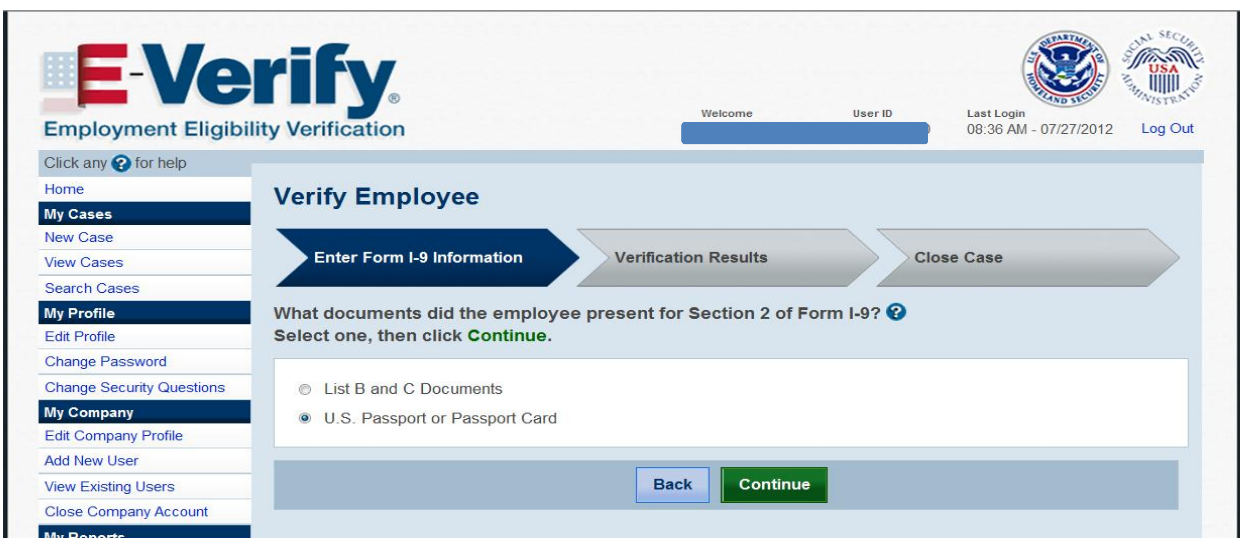
This will take you to the first screen of the E-Verify process where you will verify the employee's citizenship. Make your selection based on what the employee entered on the I-9. Click Continue.



Select which documents the employee used. Click Continue.

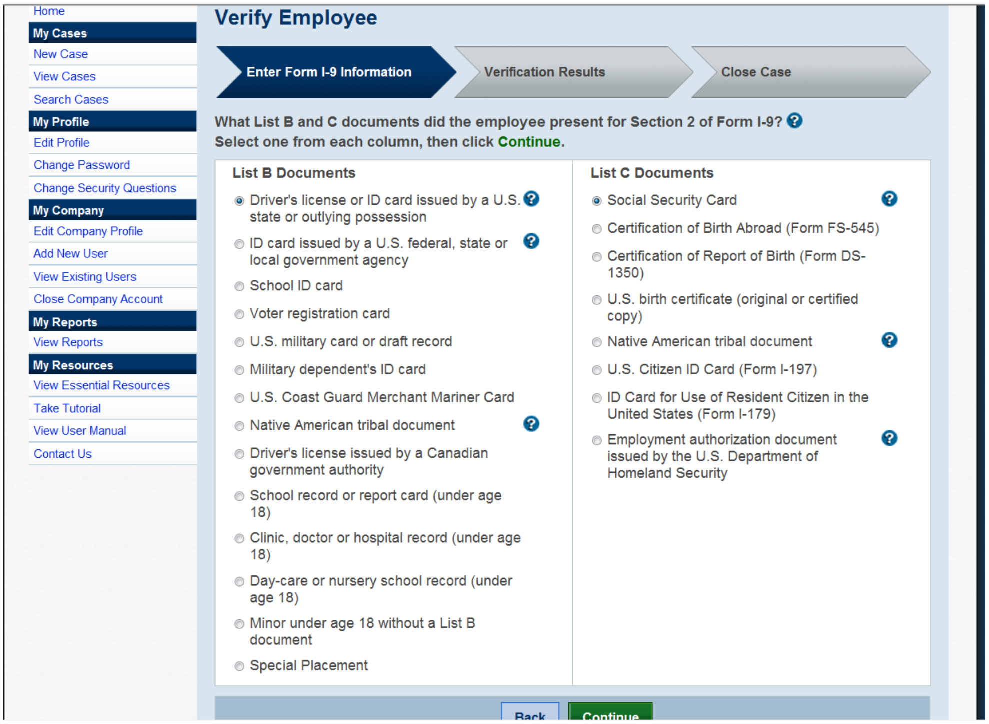


OR

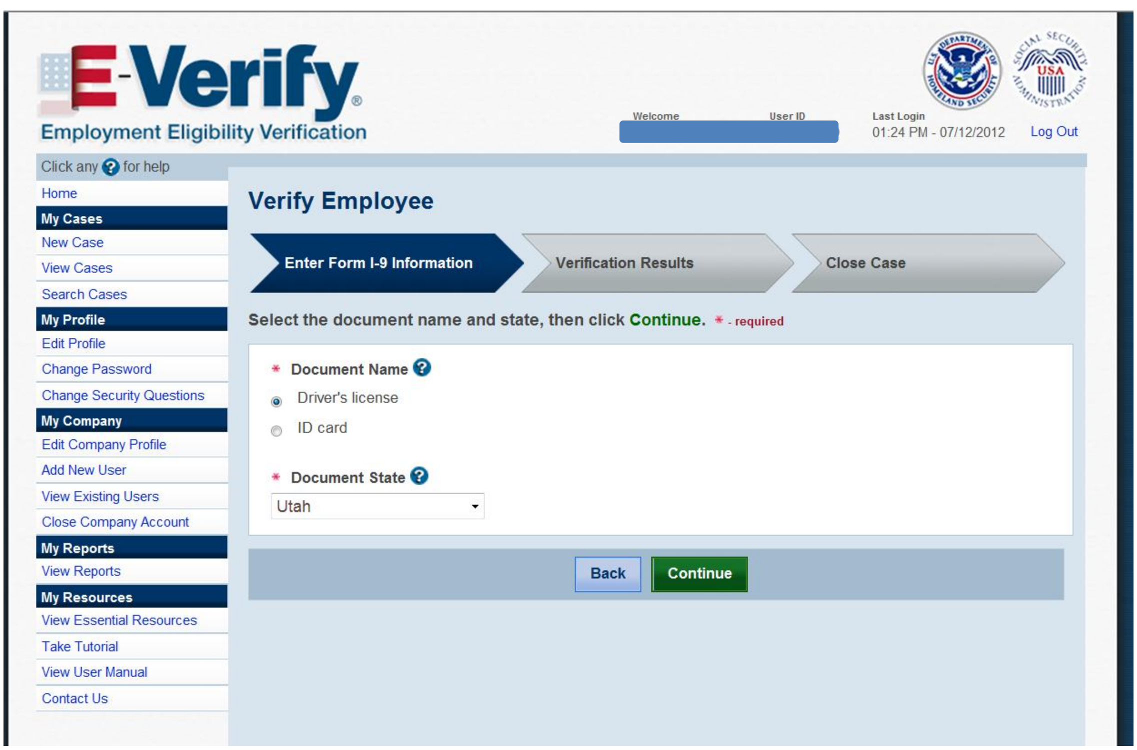


*If you chose **U.S. Passport or Passport Card (List A documents)**, skip to the next page.

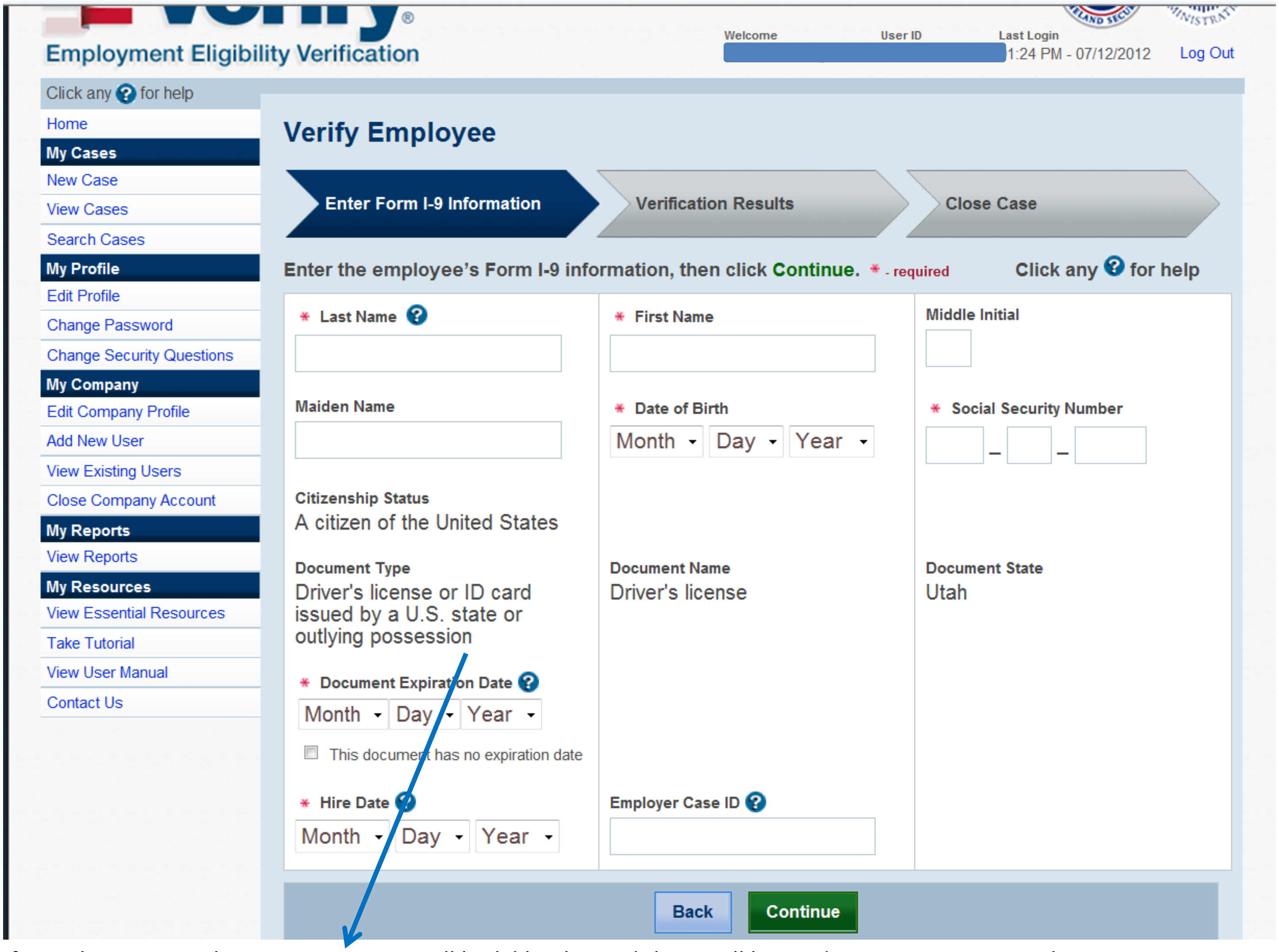
*If you chose **List B and C documents**, you will be taken to this screen where you will select the documents the employee used on the I-9. *This screen and the next are for B and C documents only.* Click Continue.



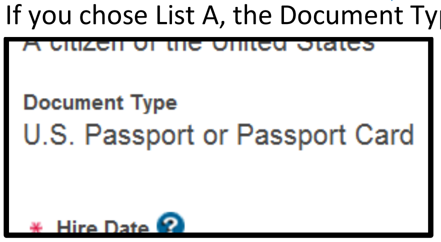
Select the document used and the issuing State. Click Continue.



If you chose U.S. Passport or Passport Card (List A Documents), you will be led directly to this page. Enter the employee's information. It is VERY important that you enter this information correctly.

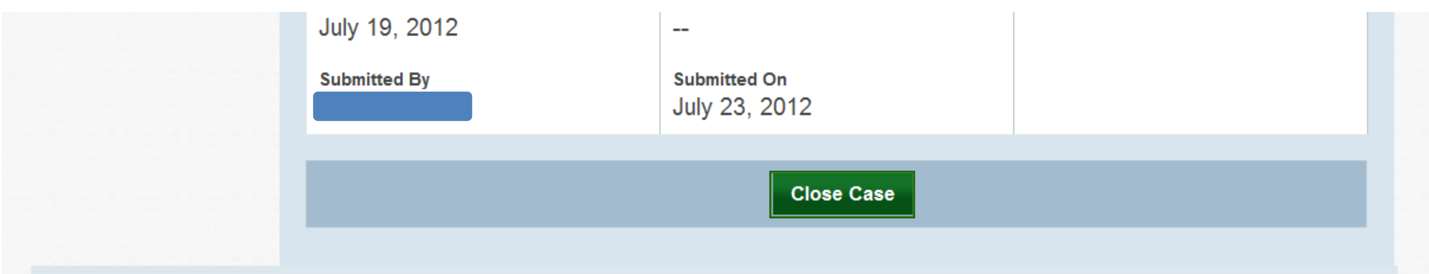


If you chose List A, the Document Type will look like this and there will be no document expiration date to enter:



The next screen will tell you if the employee is eligible to work in the United States.

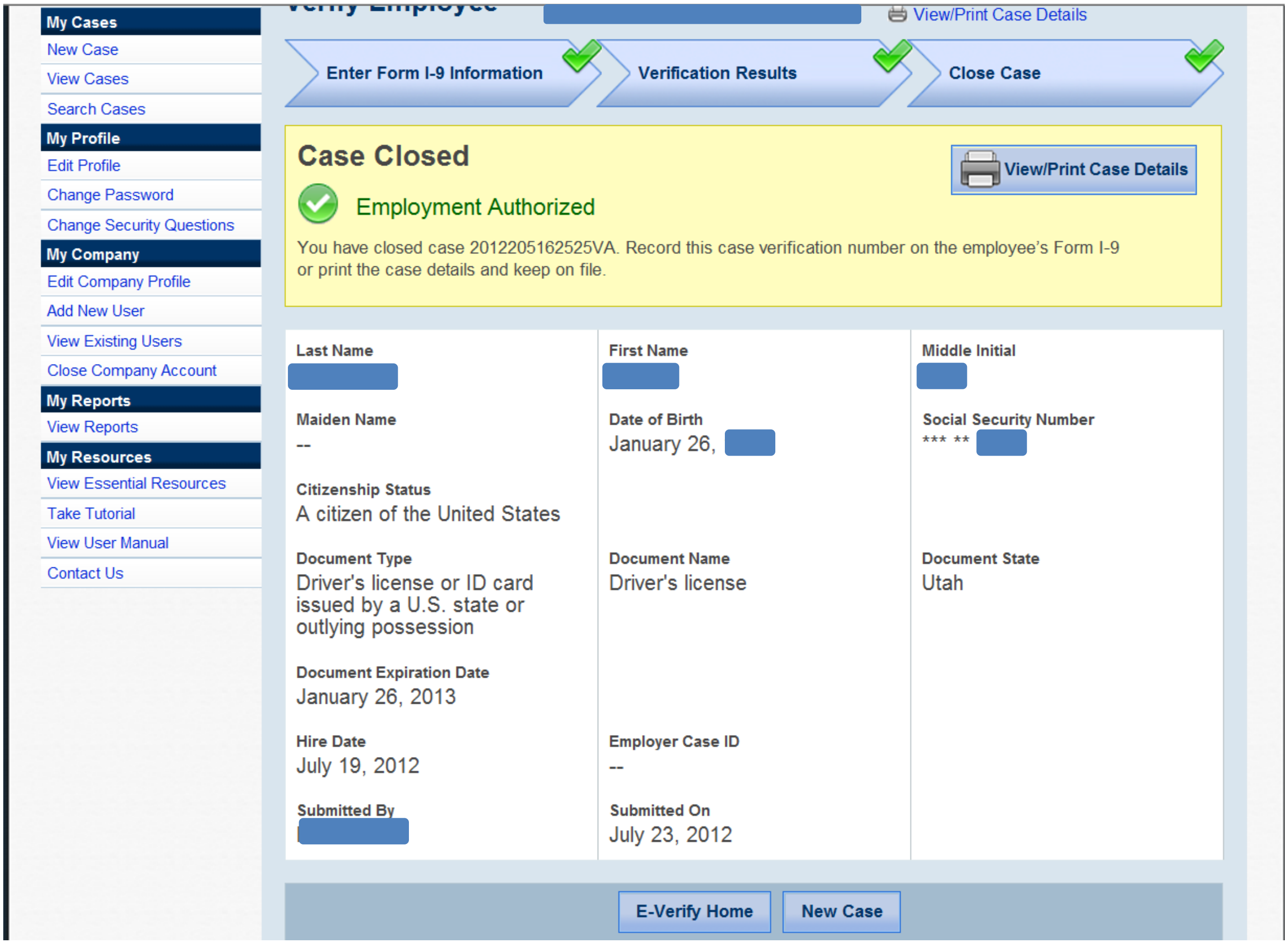
Click Close Case.



You will be asked two questions about the employee's continued employment before the case is closed.

AND

Click View/Print Case Details and print to Adobe PDF. Combine this document with the I-9 PDF, if possible, and upload to HR Docs.



Reminder Email for an I9 Approver

- Kindly
- Template email –

  Good Morning [Name],

  I was trying to process [Name and EIN] as a new hire, but noticed their I9 had not been approved. I have their start date as [Start Date] and wondered if there were any issues or if the start date needed to be changed. If not, could you please approve the I9 as soon as possible?

When To Escalate

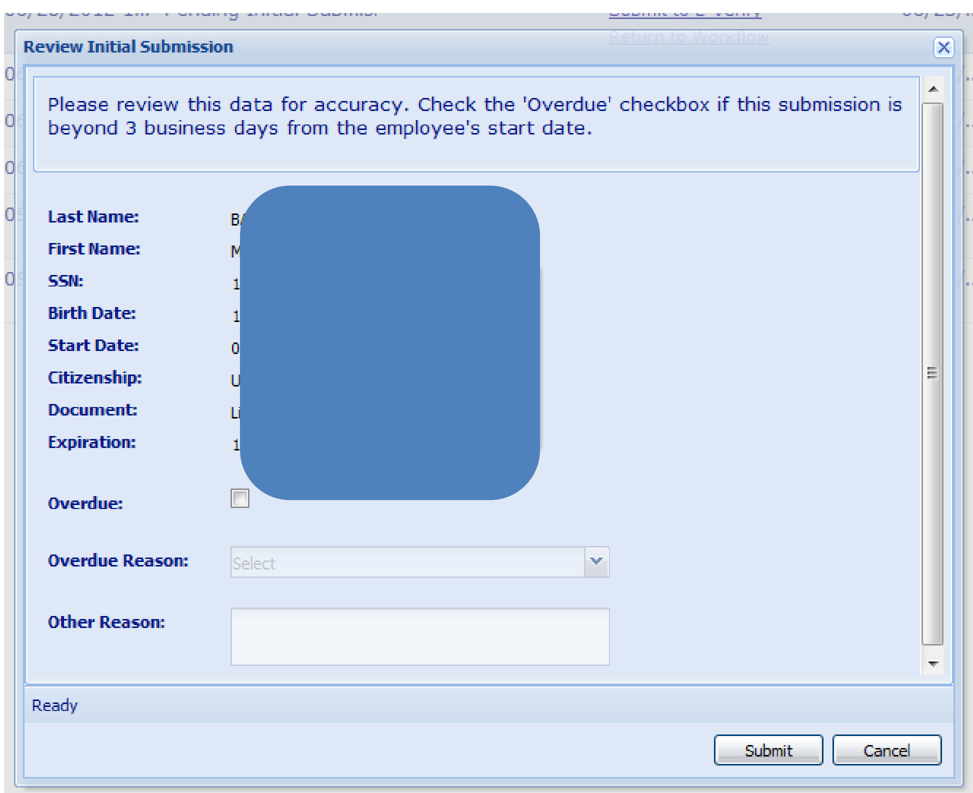
- If you have tried to contact the recruiter, I-9 approver, or manager for completion of the I-9 or any other part of the Onboarding process and have received no response or you have received a response but no action has been taken – escalate to the Intake/Onboarding lead.
- If you have a difficult employee, I-9 approver, manager, or recruiter – escalate to the Intake/Onboarding lead.
- If you are informed that an employee will not actually be working for the State after you have received their records for processing – escalate to the Intake/Onboarding lead.

Completing the E-Verify process through Onboarding (a basic example):

Once the employee and I-9 approver have completed their portions of the I-9 and the approver has submitted the I-9, it will appear in the I-9 Verification Screen in the Onboarding program.

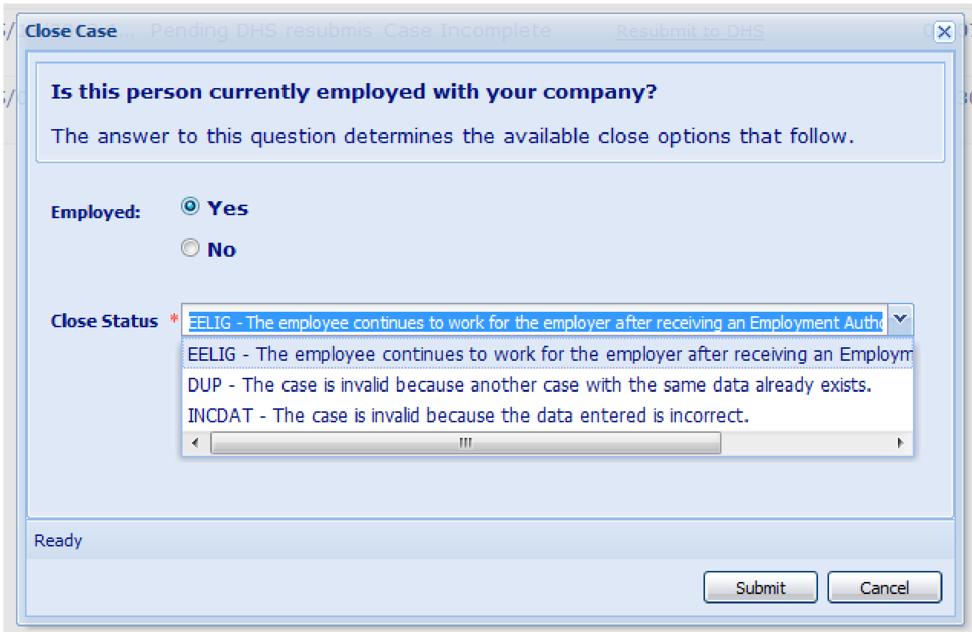
To submit the E-Verify, click on the blue Submit to E-Verify link in the Respond column. The second option in that column, Return to Workflow, will return the I-9 to the I-9 approver. Use this option if you notice information is wrong on the I-9, such as a birthdate.

After you click Submit to E-Verify, a dialogue box will pop up with the employee's information listed and the type of documents used for the I-9. You will also see a check box next to Overdue. Check this box if the I-9 is late. Then use the Overdue Reason drop-down box to choose a reason. If your reason is not listed, choose Other and fill in the Other Reason box below it. Click Submit.



Now the Respond column will update with the option to close the case. Click Close and another dialogue box will appear asking questions about the employee's employment status. These are the same questions that appear when closing a case directly through the E-Verify website. Choose Yes or No to answer if the employee is still employed with the State. Then choose the Close Status from the drop-down box:

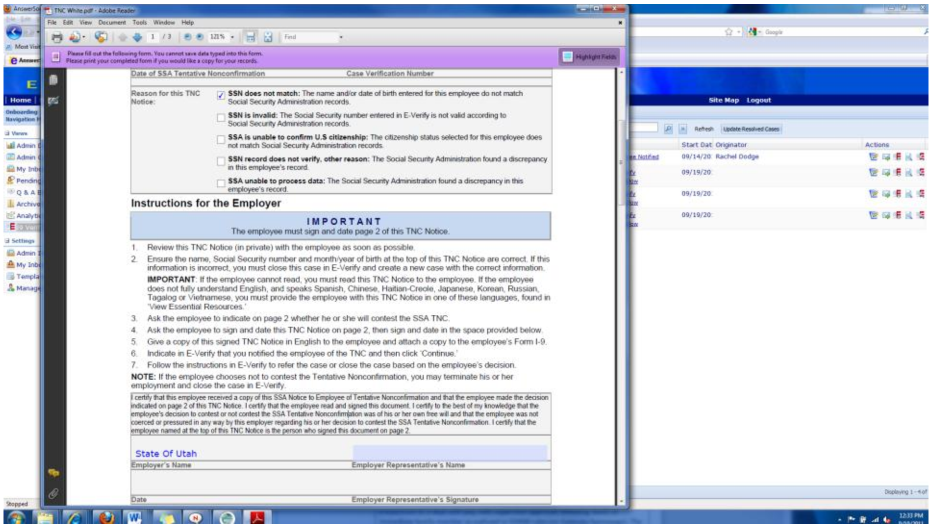
- Choose "EELIG" if the employee is still working for the State
- Choose "DUP" if the case is a duplicate and the E-Verify has already been done.
- Choose "INCDAT" if the information on the I-9 is incorrect and the E-Verify needs to be done again correctly.



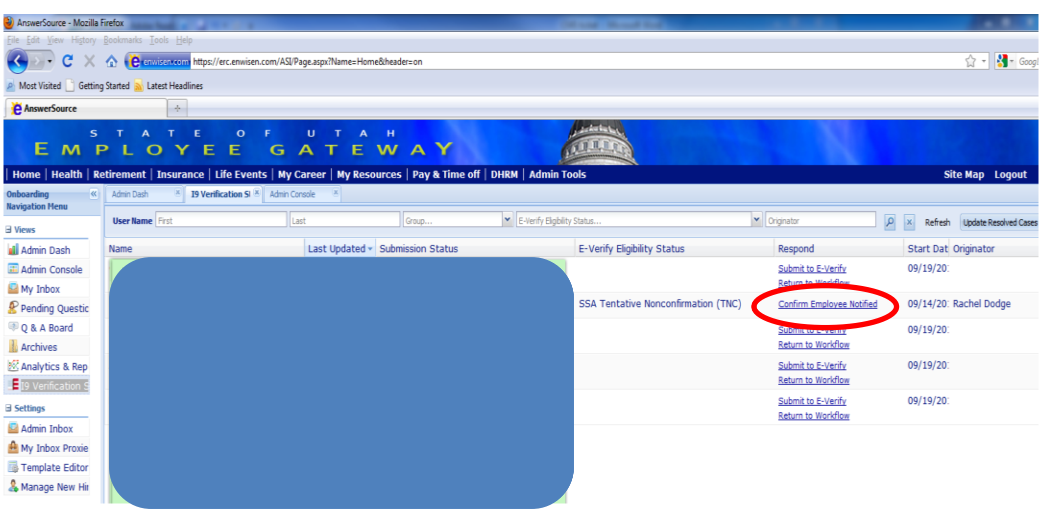
Click "Submit" and the employee will disappear from the I9 Verification Screen. The E-Verify is now complete.
This is how the majority of your E-Verify submissions through Onboarding will go.

So you receive a Tentative Non-Confirmation (TNC)…

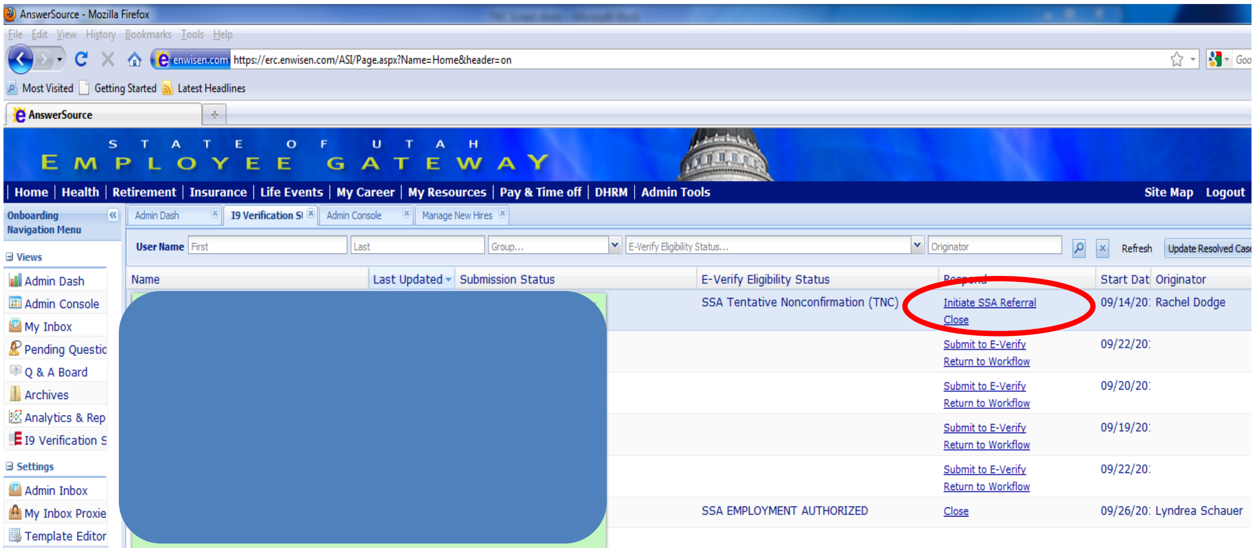
TNC Notice from E-Verify to new EE. You have clicked to submit the E-Verify and it comes back as a Tentative Non-Confirmation. This means that something in the employee's information does not match the records of the Social Security Administration (SSA) or the United States Department of Homeland Security (DHS). Click on the underlined title in the Respond column to open and save the TNC to your desktop. The TNC will give the reason for the notice and instructions for you, HR personnel, and the employee.



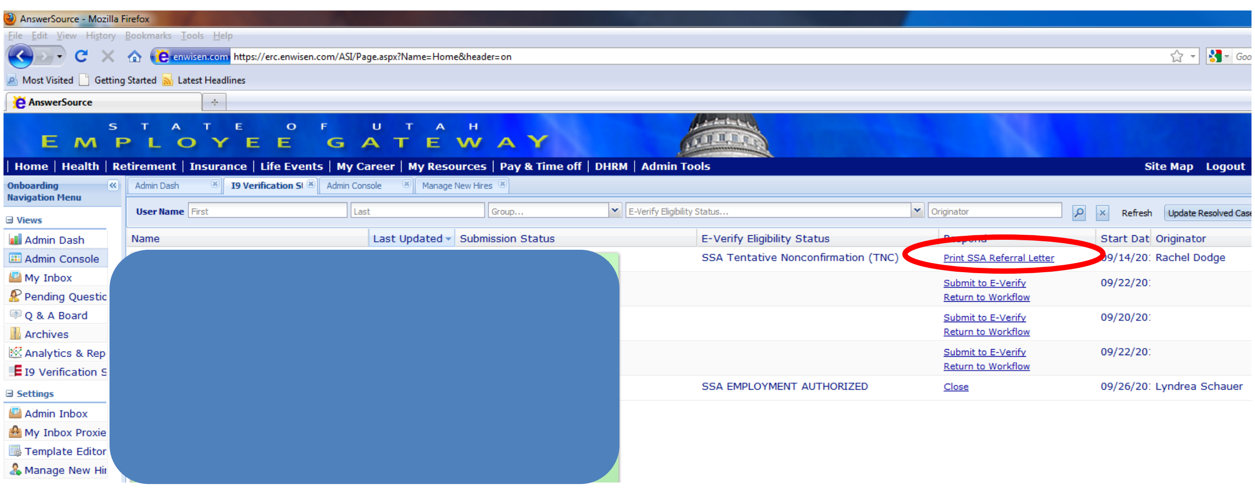
After you have opened the TNC, E-Verify will update the Respond column to "Confirm Employee Notified." DO NOT CLICK CONFIRM EMPLOYEE NOTIFIED. At this point, save the TNC to the employee's HR Docs and email the TNC to the HR personnel who needs to meet with the employee. Normally, the recruiter should be the HR personnel receiving the TNC and administering it to the employee. TNCs are to be kept confidential and dealt with only between the HR personnel and the employee. Do not assume that the I-9 approver is HR staff; many times the approver will be a supervisor or office specialist who should not be privvy to the results of the E-Verify. *This document provides the opportunity for the employee to contest the TNC* – meaning they will go to an SSA or DHS office to prove their identity or update what SSA/DHS has on file. An example is when the employee's birthday is incorrect in SSA's records: the employee will need to obtain his birth certificate to prove his birthdate and get it fixed with the SSA. Obtain a copy of the signed TNC and verification from whoever met with the employee that the meeting took place, then click on "Confirm Employee Notified."



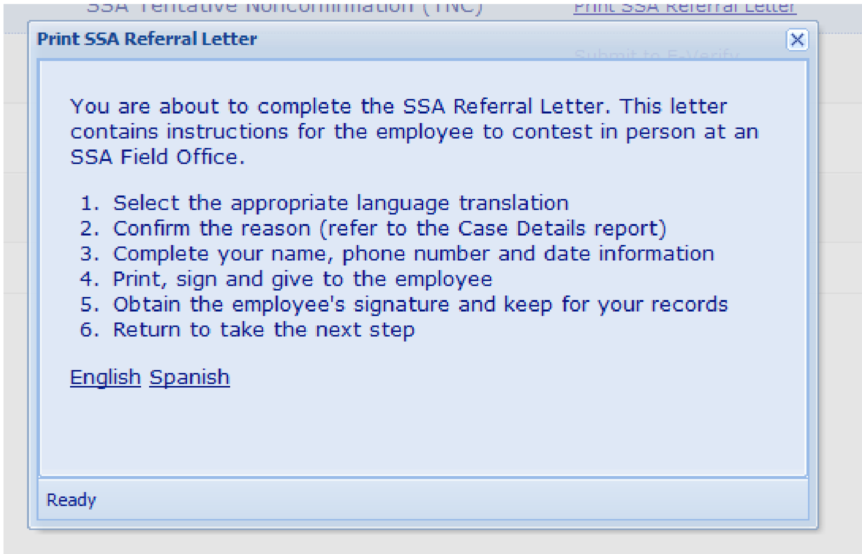
Click on "Initiate SSA Referral." A box will pop up again saying it is performing the request and then E-Verify updates the Respond column to say "Print SSA Referral Letter."



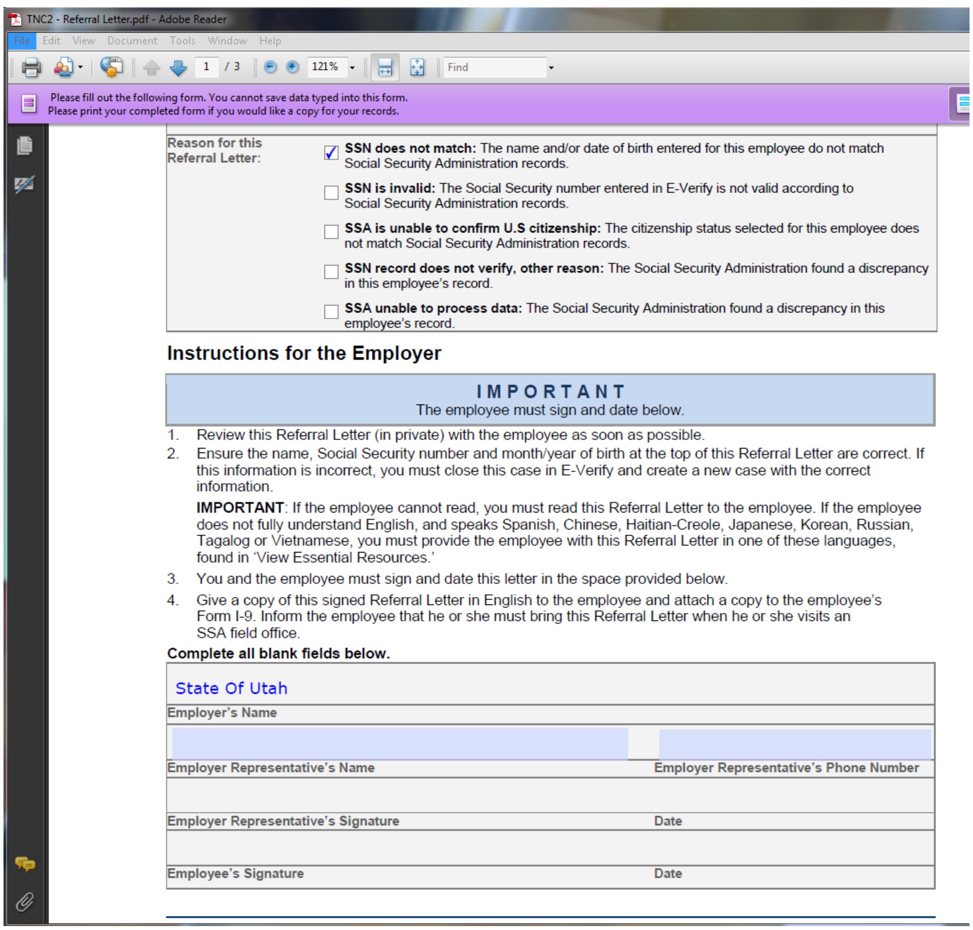
Click on "Print SSA Referral Letter." A dialogue box will appear. Instructions 2 – 5 are for whoever will be meeting with the employee. Record these in the email you send to the HR personnel who is dealing with this case, with the Referral Letter attached.



The Referral Letter: Select the language desired, English or Spanish**.** The Referral Letter will open. Save the Referral Letter for the employee's HR Docs and email this letter to the HR personnel. **Notify** HR that they need to fill in their own name and phone number on the first page, as well as the date the EE must visit the SSA by on the second page.



Page 1 of the Referral Letter:



Reason for this Referral Letter:

- [x] **SSN does not match:** The name and/or date of birth entered for this employee do not match Social Security Administration records.
- [ ] **SSN is invalid:** The Social Security number entered in E-Verify is not valid according to Social Security Administration records.
- [ ] **SSA is unable to confirm U.S citizenship:** The citizenship status selected for this employee does not match Social Security Administration records.
- [ ] **SSN record does not verify, other reason:** The Social Security Administration found a discrepancy in this employee's record.
- [ ] **SSA unable to process data:** The Social Security Administration found a discrepancy in this employee's record.

Instructions for the Employer

IMPORTANT
The employee must sign and date below.

1. Review this Referral Letter (in private) with the employee as soon as possible.
2. Ensure the name, Social Security number and month/year of birth at the top of this Referral Letter are correct. If this information is incorrect, you must close this case in E-Verify and create a new case with the correct information.

   IMPORTANT: If the employee cannot read, you must read this Referral Letter to the employee. If the employee does not fully understand English, and speaks Spanish, Chinese, Haitian-Creole, Japanese, Korean, Russian, Tagalog or Vietnamese, you must provide the employee with this Referral Letter in one of these languages, found in 'View Essential Resources.'
3. You and the employee must sign and date this letter in the space provided below.
4. Give a copy of this signed Referral Letter in English to the employee and attach a copy to the employee's Form I-9. Inform the employee that he or she must bring this Referral Letter when he or she visits an SSA field office.

Complete all blank fields below.

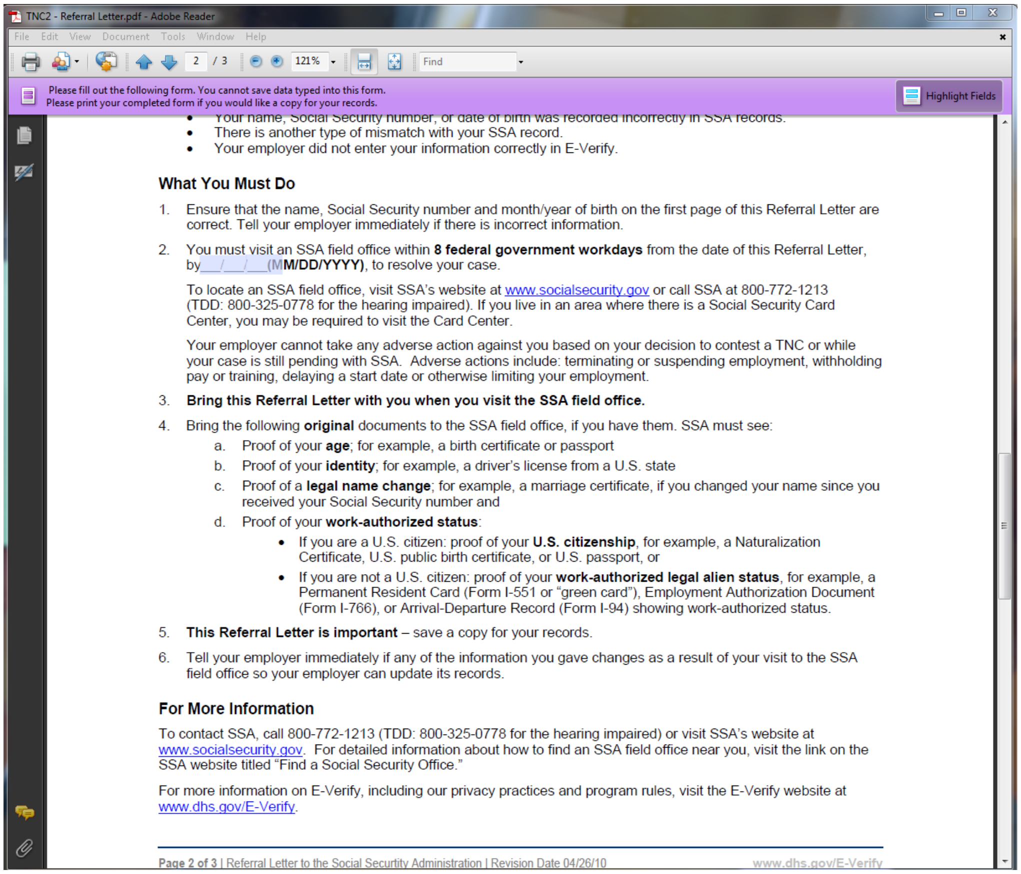
State Of Utah
Employer's Name

Employer Representative's Name | Employer Representative's Phone Number

Employer Representative's Signature | Date

Employee's Signature | Date

Page 2 of the Referral Letter:



- Your name, Social Security number, or date of birth was recorded incorrectly in SSA records.
- There is another type of mismatch with your SSA record.
- Your employer did not enter your information correctly in E-Verify.

What You Must Do

1. Ensure that the name, Social Security number and month/year of birth on the first page of this Referral Letter are correct. Tell your employer immediately if there is incorrect information.
2. You must visit an SSA field office within **8 federal government workdays** from the date of this Referral Letter, by__/__/___(M**M/DD/YYYY)**, to resolve your case.

   To locate an SSA field office, visit SSA's website at www.socialsecurity.gov or call SSA at 800-772-1213 (TDD: 800-325-0778 for the hearing impaired). If you live in an area where there is a Social Security Card Center, you may be required to visit the Card Center.

   Your employer cannot take any adverse action against you based on your decision to contest a TNC or while your case is still pending with SSA. Adverse actions include: terminating or suspending employment, withholding pay or training, delaying a start date or otherwise limiting your employment.
3. **Bring this Referral Letter with you when you visit the SSA field office.**
4. Bring the following **original** documents to the SSA field office, if you have them. SSA must see:
   a. Proof of your **age**; for example, a birth certificate or passport
   b. Proof of your **identity**; for example, a driver's license from a U.S. state
   c. Proof of a **legal name change**; for example, a marriage certificate, if you changed your name since you received your Social Security number and
   d. Proof of your **work-authorized status**:
      - If you are a U.S. citizen: proof of your **U.S. citizenship**, for example, a Naturalization Certificate, U.S. public birth certificate, or U.S. passport, or
      - If you are not a U.S. citizen: proof of your **work-authorized legal alien status**, for example, a Permanent Resident Card (Form I-551 or "green card"), Employment Authorization Document (Form I-766), or Arrival-Departure Record (Form I-94) showing work-authorized status.
5. **This Referral Letter is important** – save a copy for your records.
6. Tell your employer immediately if any of the information you gave changes as a result of your visit to the SSA field office so your employer can update its records.

For More Information

To contact SSA, call 800-772-1213 (TDD: 800-325-0778 for the hearing impaired) or visit SSA's website at www.socialsecurity.gov. For detailed information about how to find an SSA field office near you, visit the link on the SSA website titled "Find a Social Security Office."

For more information on E-Verify, including our privacy practices and program rules, visit the E-Verify website at www.dhs.gov/E-Verify.

Page 2 of 3 | Referral Letter to the Social Security Administration | Revision Date 04/26/10 www.dhs.gov/E-Verify

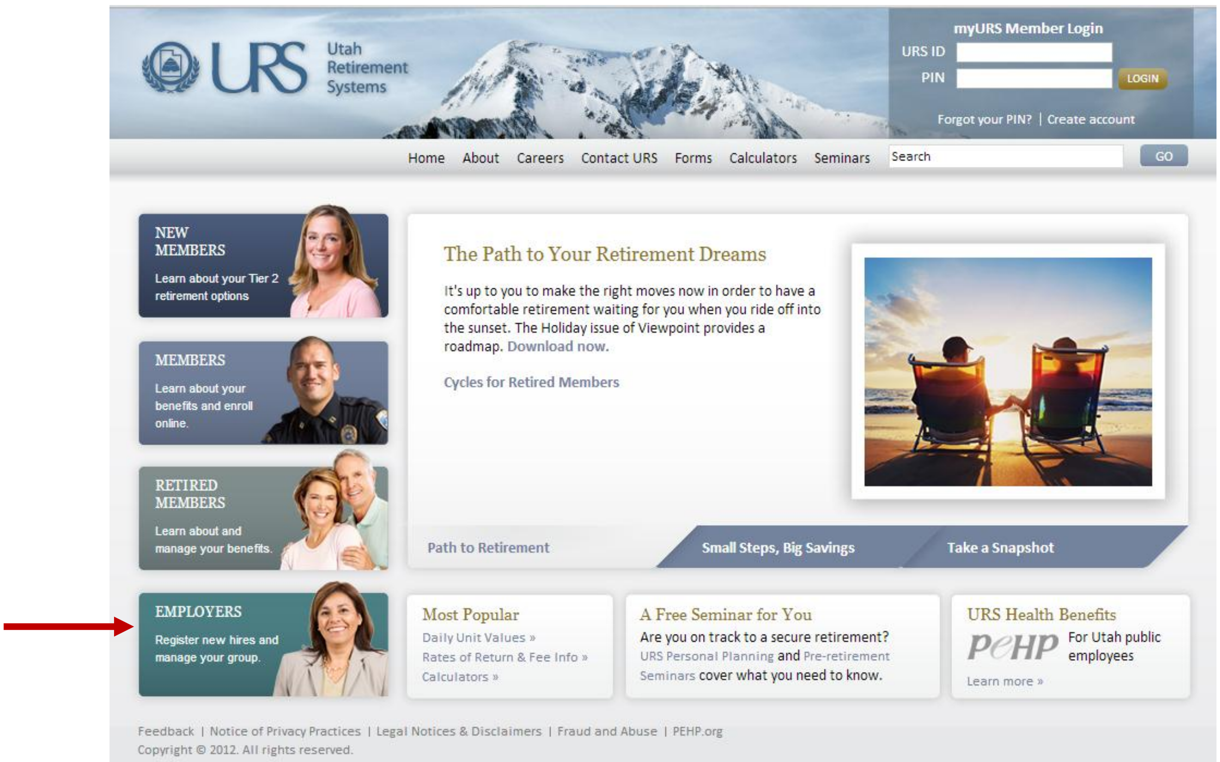
After clicking to print the Referral Letter, E-Verify will update the Respond column to say Use 'Update Resolved Cases'. Click the button at the top of the I9 Verification Status screen next to Refresh, Update Resolved Cases. E-Verify will again update the Respond column to give you the option to Resubmit or Close.

You have now "referred" the employee to the Social Security Administration or Department of Homeland Security and notified SSA/DHS that the employee is contesting. The employee now has 8 days from the date of the Referral letter, *including* the date of the Referral letter, to meet with SSA or DHS. The employee will need to take his copy of the Referral Letter when he goes to resolve the issue.

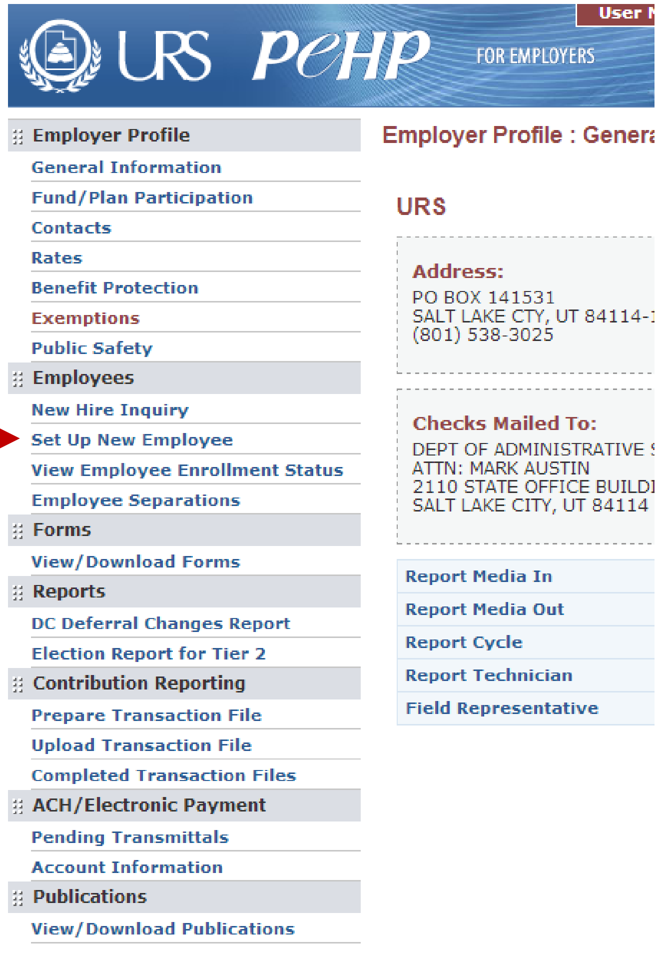
URS Certification

All state employees must be certified in the Utah Retirement Systems online certification system. The only exceptions are resident workers at the Utah State Hospital, who are not certified with URS.

The online certification is completed at www.urs.org. Locate and click on the box titled "Employers" to register new hires. Each agency in the State of Utah work group is assigned with a login id and password; you can find a list of these on the ERIC Shared (R) drive. Once you are on the Employers homepage, login at the top right corner. You will know you are in the right place if it says URS for Employers above the login field.

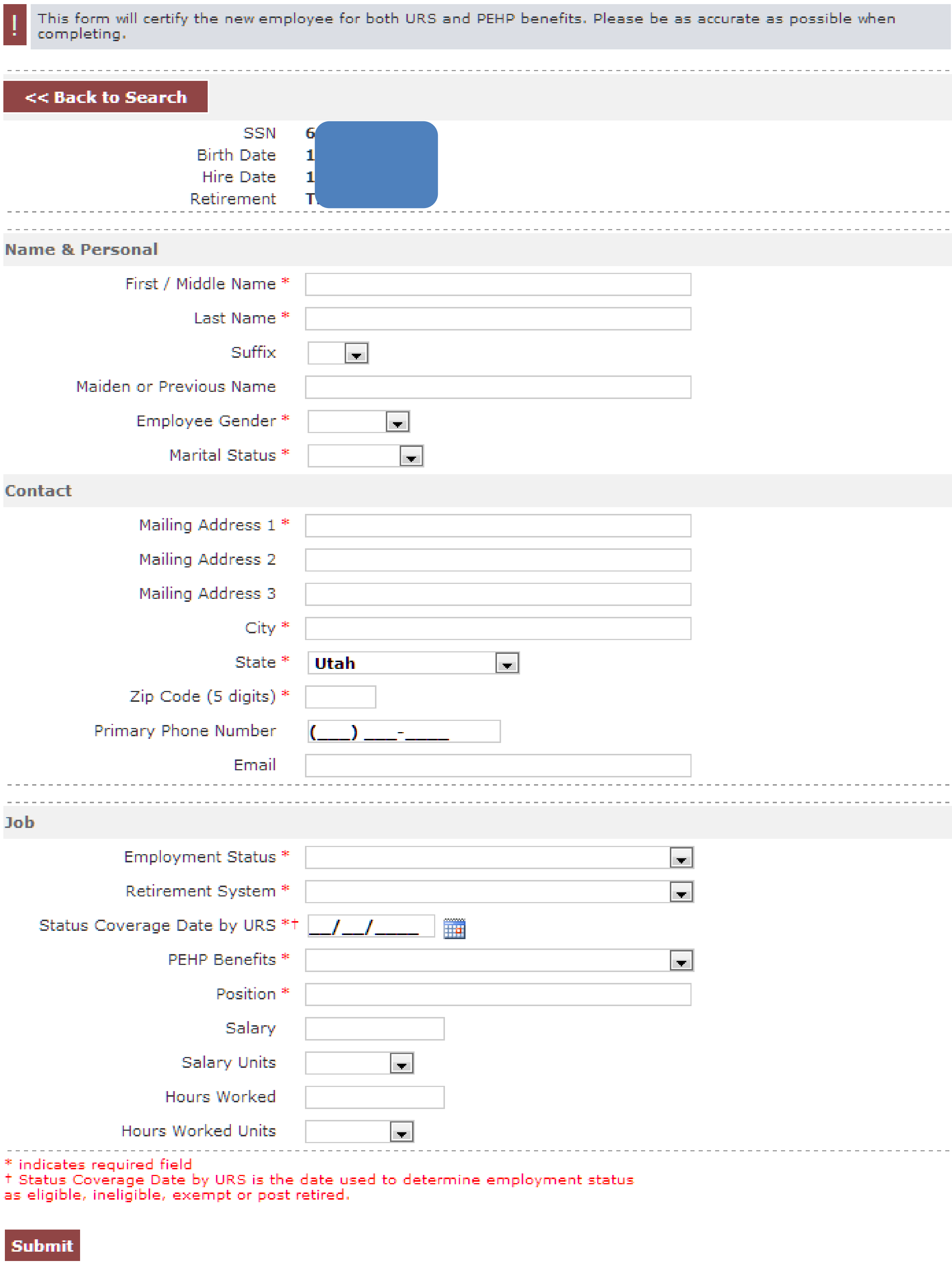


Once successfully logged in, click Set Up New Employee in the left side menu.



On the next screen, enter the employee's social security number, date of birth and hire date. Click Search.

If the employee is already in the URS system, the next screen will auto-populate with the employee's name and information from previous records. If no record is found, you will need to enter in the employee's information yourself. Make sure to at least fill in each field with a red asterisk; click Submit.



! This form will certify the new employee for both URS and PEHP benefits. Please be as accurate as possible when completing.

<< Back to Search

SSN [redacted]
Birth Date
Hire Date
Retirement

Name & Personal

First / Middle Name *
Last Name *
Suffix
Maiden or Previous Name
Employee Gender *
Marital Status *

Contact

Mailing Address 1 *
Mailing Address 2
Mailing Address 3
City *
State * Utah
Zip Code (5 digits) *
Primary Phone Number (___) ___-____
Email

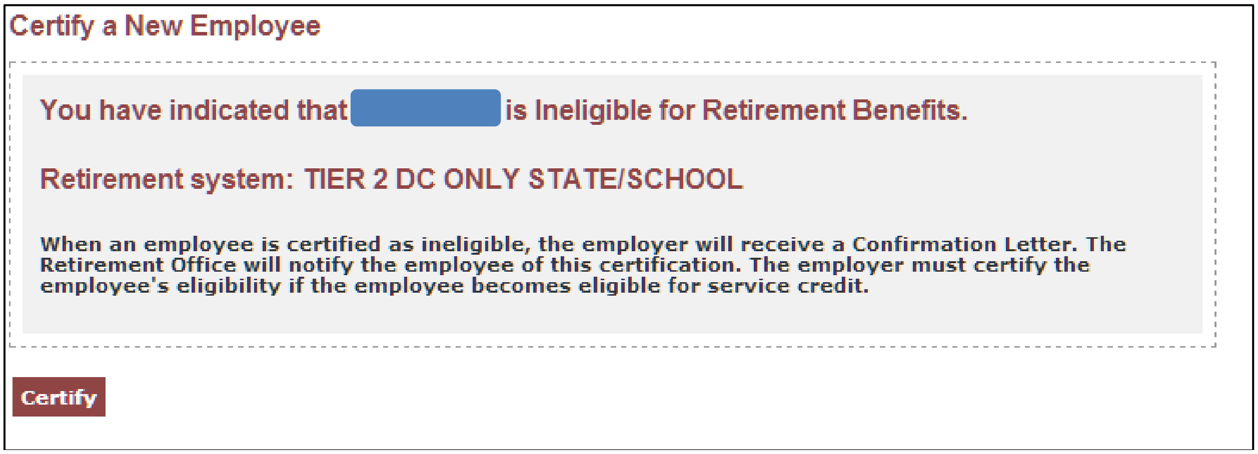
Job

Employment Status *
Retirement System *
Status Coverage Date by URS *† __/__/____
PEHP Benefits *
Position *
Salary
Salary Units
Hours Worked
Hours Worked Units

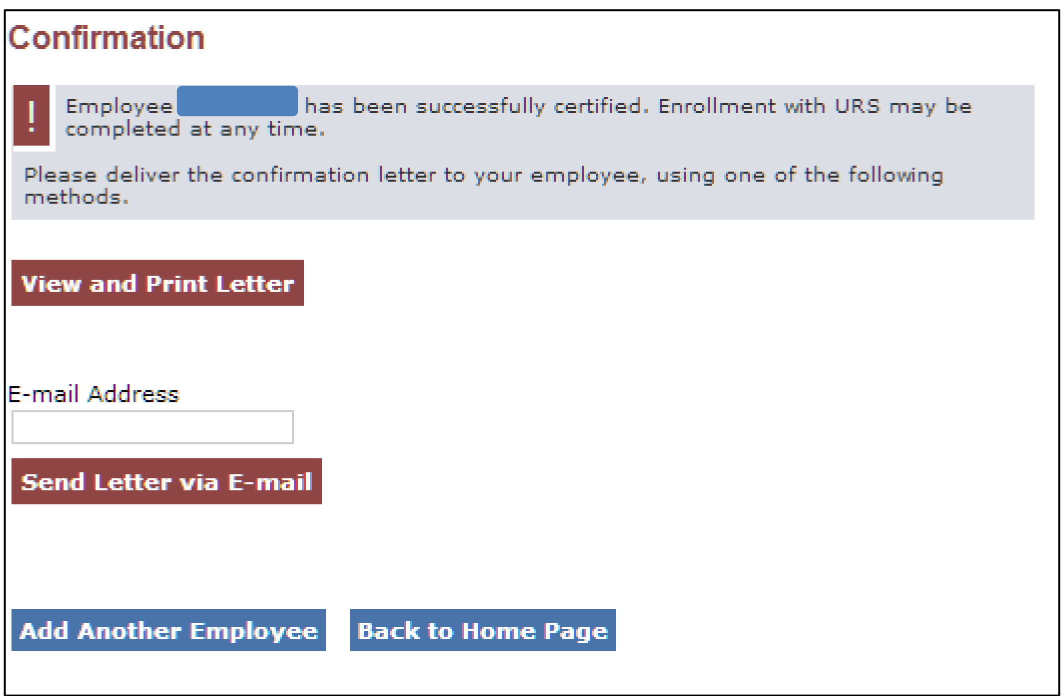
* indicates required field
† Status Coverage Date by URS is the date used to determine employment status as eligible, ineligible, exempt or post retired.

Submit

After the information is submitted, the next page will verify that you want to certify the employee as eligible or ineligible and it will show you what URS Tier the employee is in. Click Certify.



The next page confirms that the employee has now been certified with URS. Click View and Print Letter to view and save the employee's URS Certification to later send to the employee via mail or email. It is possible to send the certification to any email address by entering the address in the E-mail Address field and clicking Send Letter via E-mail. However, our current practice is to send a specific template email to the employee with the certification attached. The certification letter contains subscriber information that is vital for the employee's benefits enrollment.



During the certification process, the following errors might be encountered:

- Employee already exists in URS and/or PEHP.
- Login credentials do not work.
- Retired employees will have to submit a Post-Retirement Employment form along with online certification. The employee will have to select options for pension payments.

FAQ's

1. ERIC customer service staff may contact URS at (801) 366-7138 to resolve employee records issue. Barbara Smith is the URS contact for ERIC login and passwords. Barbara can be contacted at (801) 538-3005.
2. The ERIC URS access codes are found on the R:\BBSDT\ERIC\ drive.
3. The URS Certification form is saved to HR DOCS and emailed directly to the employee from the onboarding email address.
4. POST certified positions will be auto-populated if the POST retirement group is selected.
5. Resident works are never certified with Utah Retirement Systems.

Benefits Notification

Upon completion of the URS certification, the employee should be notified via mail or email. Some employees do not provide a personal email address and are not issued a State email address; this is when you would send the notification via mail. Otherwise, you will send an email directly to employee from the onboarding@utah.gov email address with the URS Certification attached as a PDF. Best practice would be to notify the employee through both the personal and state email addresses if possible.

There are two templates for the emails you send, one for Benefitted employees and one for non-benefitted employees. These are located on the Shared ERIC R drive. Please see the current templates below.

A phone call to the employee should be made as a follow up to the benefits email during the 1st week of employment. We want to make sure the employee is aware of the benefits that are available.

Benefitted employees should receive the following email notification:

Dear new state employee *(Insert employee's name):*

You are eligible for state benefits and can begin to explore your options and enroll in these benefits now. The attached documents provide access information to the Utah Retirement System (URS) and Public Employee Health Plan (PEHP) websites.

To help you select a health care plan, we have created a comprehensive Health Benefits Training module that can be found at the following link:

Health Benefits Training: https://sites.google.com/a/utah.gov/health-plan-choices12-13/home

Please note: You have 60 days from the date you become eligible for coverage to enroll you and your eligible dependents for coverage. The effective date of your coverage will be your hire date. Eligible employees have 60 days from the hire date to enroll in or decline a medical plan. During the first 30 days from the hire date, the employee may choose from all medical plan options.

After 30 days and up to day 60 from the hire date, the employee may only select HSA-qualified plans. If that employee is ineligible for a Health Savings Account (HSA), the employee will be enrolled in the HSA qualified plan of his or her choosing, but the state's HSA contributions will be forfeit.

After 60 days, the employee is considered a late enrollee and will not be allowed to enroll in any of the medical or dental plan options. You and your dependents will have to wait until the next annual enrollment period to enroll.

You can find the Benefits Book here: Benefits Book Link

Please also visit the New Employee website link below to view information and forms relating to:
- Establishing Direct Deposit
- Pay and Holiday Schedule
- Employee Benefits Book
- Benefits Briefing
- Retirement plans
- Online trainings (Including Workplace Harassment Prevention, STAR Benefit Training, IT Security, and Safe Driver Training)

New Employee Link: http://www.dhrm.utah.gov/newemployees/resources.html

If you do not have regular access to a computer during your work day, please see your supervisor for additional instructions.

If you have questions about the information contained in this email or any other matter related to your employment with the State of Utah, please visit www.employeegateway.utah.gov or call ERIC at 801-538-ERIC (3742), available from 8:00 a.m. to 5:00 p.m., Monday through Friday, except holidays.

We wish you success in your new job!

Thanks,

Employee **R**esource **I**nformation **C**enter
Department of Human Resource Management
Onboarding@utah.gov
801-538-ERIC (3742) Office

Non-benefitted employees should receive the following email notification:

Dear new state employee *(Insert employee's name):*

You are eligible for select state benefits and can begin to explore your options and enroll in these benefits now. The attached document provides access information to the Utah Retirement System (URS) websites.

Please visit the link below to view information and forms for:
- Direct Deposit
- Pay and Holiday Schedule
- Retirement plans
- Online trainings (Including Workplace Harassment Prevention, IT Security, and Safe Driver Training)

New Employee Link: http://www.dhrm.utah.gov/newemployees/

If you do not have regular access to a computer during your work day, please see your supervisor for additional instructions.

If you have questions about the information contained in this email or any other matter related to your employment with the State of Utah, please visit www.employeegateway.utah.gov or call ERIC at 801-538-ERIC (3742), available from 8:00 a.m. to 5:00 p.m., Monday through Friday, except holidays.

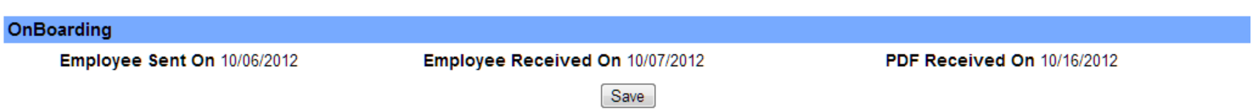
We wish you success in your new job!

Employee **R**esource **I**nformation **C**enter
Department of Human Resource Management
Onboarding@utah.gov
801-538-ERIC (3742) Office
801-538-3616 Fax
Monday through Friday 8:00 AM to 5:00 PM
Except State and Federal holidays

HRE Personal Tab and New Hire/Rehire Action

Personal Tab

- Employee's address should be in all CAPS
- Compare date of birth in HRE to driver license or other document to ensure this is correct. In some situations the employee's date of birth will be entered as a bogus date, such as 1/1/1910, by ERIC staff. Please make sure the employee has corrected this. Correct the birth date if needed.
- Ensure the employee has a primary contact listed.
- Click the Run Validator button to make sure there are no errors on the page.
- Always click Save at the bottom of the screen.
- At the bottom of this tab you can see what the status of the employee's Onboarding is. It will show you when the Onboarding was sent to the employee, when it was received into HRE and when the HR Docs were uploaded to HRE:



New Hire/Rehire Action

You will need to go into the employee's HRE action, complete the missing fields, and submit it for approval. To access the action, click on the image of the two pieces of paper to the left of the most recent action titled New Hire or Rehire.

Name: [redacted] **Employee ID:** [redacted]

Action History

Add Action **Show All**

		Effective Date	Seq Num	Action	Hrly Rate	Slry Step	Long Step	Job Title	Agncy	Status
		10/15/2012 [REPLACEMENT]	1	New Hire	$12.58	0	0	EMPLOYEE RESOURCE INFORMATION CENTER HUMAN RESOURC	140	Active

Should say "New"

The information in the action will depend on the DPR, Agency, Employee and onboarding documents. Make sure to use the Special Codes cheat sheet on page 45 of this document to verify you are entering the correct information.

<u>Please study the next page</u> to understand what you will need to enter or verify. When you have completed the action, click the Run Validator button in the top right to see if HRE catches any errors. If no errors, click Review for Approval at the bottom of the action.

*NOTE: On the action screen, mark the employee as Full-time unless otherwise noted. If employee is schedule IN, list as part-time as the employee will be work a full-time schedule.

Employee Action Record

When approved and processed, this record will become a new action on this employee's record.

Run Validator

Action Reason New Hire
(Actions Help)

Effective Date 11/28/2012

You will need to add the DPR for manual Hires

Working Title OFFICE TECHNICIAN II ...

View MPR

DPR ID 48010885

View DPR

Agency 480 - Dept of Environmental Quality

Org 7753

Record Status New

Competitive Hire Number Direct Hire ...

Pay Rate Indicator 2

Salary Range $9.86 to $16.50

Hourly Rate 9.86

091 – Tier 1
500 – Tier 2 Hybrid
030 – non-benefitted

Employee Schedule TL - Time Limited

Retirement Code Select ...

(Ret Code Help)

Accrue Leave No

To accrue Leave click "Yes"

Miscellaneous Details

Full/Part Time Full Time

Insurance Benefits No

Overtime/Comptime Select ...

Check OT Agreement

Auto Pay / Time Entry Select ...

Usually Time Entry (DPR)

Delete any Comptime over 80 hrs No

OT = 0
Comp = 80 (but can vary)

Max Comp Time Accrual 80

Max Excess Time Accrual 80

Payroll Work Group Select ...

Usually 71 or 90 (Exempt)

Payroll Work Schedule ...

Usually 199

IN/TL Expiration Date

IN = 1 year; TL = 3 years

UMD Network Access Yes

UMD Email Account Yes

W-4 Information

Tax Method Select ...

Marital Status Select ...

Number of Exemptions 0

FICA Status Select ...

Additional Federal Withholding Amount 0.00

Additional State Withholding Amount 0.00

Resident State UTAH

Working State UTAH

Leave Accrual Date (mm/dd/yyyy)

If "Yes" on Accrue Leave put Hire date (Unless employee has prior service history)

Save | Review for Approval | Done | Delete Action | Cancel

<table>
<tr><th colspan="2">Special Codes</th></tr>
<tr><td>Board Members
Retirement Code: 030
Payroll Group: 91
Probation: 24 months
OT: Always Comp
Schedule: 400</td><td>Schedule AD
Annual Leave: 7 hours (Calculate 20 years, ex: 2012->1992)</td></tr>
<tr><td>Public Safety 180 – POST
Retirement Code: Tier 1-412/Tier 2-502
Payroll Group: 72
Work Schedule: 199
OT: OT unless FSLSA Exempt
Probation: 18 months (12 months for some clerical/communication positions)
All non-post are State/School Retirement</td><td>Corrections 410 – POST
Retirement Code: Tier 1-412/Tier 2-502
Payroll Group: 73
Work Schedule: 199
OT: Comp, unless they send a form
Probation: 18 months</td></tr>
<tr><td rowspan="2">Resident Workers
Part Time
Address: PO Box 270, Provo, UT 84605
Contact #: 801-344-4400
Retirement: 030
OT: None
Max Time Accrual: 0
Max Comp Time Accrual: 0
NO UMD, NO Email Access
NO FICA
NO IN/TL Expiration
NO URS Certification
NO Direct Deposit</td><td>Education 400 – FULL TIME Teachers
Auto Pay
Work Schedule: 100
Work Group: 90 (FLSA Exempt)</td></tr>
<tr><td>Education 400 – Substitute Teachers
Time Entry
Work Schedule: 199
Work Group: 71
Non-benefitted</td></tr>
<tr><th colspan="2">General Notes</th></tr>
<tr><td>Retirement Codes:
Tier 1 Benefit: 091
Tier 2 Benefit: 500
Non-Benefit: 030

Employee Schedule:
IN: 1 Year expiration, Part Time
TL: 3 Year expiration, Full Time
Rehired Retiree – refer to codes</td><td>Payroll Work Schedule:
199 (with some exceptions)

Payroll Work Group:
FLSA Non-Exempt: 71
GLSA Exempt: 90

Probation Dates:
Schedule B: 1 year
IN/TL: Date of Current Hire</td></tr>
</table>

Notifying the HR Field Office of activation

Once you have submitted the HRE action for approval and sent the benefits email, you must notify the field recruiter that the employee will be active in HRE the next day. You may use the following e-mail template:

> Dear Field Recruiter,
>
> The on-boarding process for *[Employee Name] – [EIN]*, is now complete. They should be active as of tomorrow. Let me know if you have any questions or concerns.
>
> Thanks,
> *[Your name]*

In this email you can also ask to have the Social Security sent to ERIC or uploaded to HR Docs. You can also advise if there were any issues with the onboarding process.

Employee Service Dates

To update the employee's service dates, click on the Service tab in the employee's HRE record. The following information can be found in this tab by clicking on the Help link at the top of the page.

Original Hire Date (OHD): The first date an employee came to work for the State of Utah. This date is set automatically when the system activates the new hire record. There is never a reason for this date to be changed, even when an employee completes probation and becomes a career service (schedule B) employee or when an employee converts from a Schedule A position to a Schedule B position.

Current Hire Date (CHD): The most recent start date of an employee. This date is set automatically when the system activates the new hire or rehire record. If an employee does not have a break in service, the CHD will be the same as their OHD. This date will only be different from the OHD if there has been a termination action followed by a rehire action (a break in service).

NOTE: The OHD and CHD reflect employment time and do not depend on employee schedule or benefited time.

Leave Accrual Date (LAD): The date the employee became eligible to receive benefits. This date is set automatically when the system activates the new hire record and is entered without regard to schedule code. An employee that does not have a break in service and is eligible to receive benefits from the date of hire should have their LAD match their OHD and CHD. This date reflects benefited time for the calculation of leave accrual and not length of employment or schedule.
NOTE: The only exception to this is Schedule A employees who are entitled to a 7 hour leave accrual because of their position. Typically these are Executives or Appointed Officials; please see DHRM rule to determine eligibility. With these employees you will manually set their LAD to 20 years prior to the CHD.

Estimated Leave Accrual Rate: Rate at which the employee accrues annual leave hours per pay period. This is only calculated if the LAD has a value in it. This calculation figures the number of years between the LAD and the End Date (if the employee has no termination action, today's date is used as the End Date).

Probation End Date (PED): The date the probationary period ends for a career service (schedule B) employee. This date is not calculated and must be entered manually. To determine the PED, see the Job Description in the employee's DPR. At-will employees (schedule A, TL or IN) do not have a probationary period, so this date should be the same as the OHD and/or CHD.

Adjusted Service Date (ASD): The date (counting back from the CHD) that includes all prior service periods as if it had all been served consecutively. This is calculated by the system based on the OHD and CHD, as well as information entered into the Prior Service History and Leave Accrual Exemption History sections of the Service Tab. This date reflects all state service time, regardless of benefit eligibility, schedule, or any other criteria. If there are no prior service year records, the ASD is set to equal the CHD. If this date is not calculating, click Save. You will see the *Years of Service Calculation* directly underneath the ASD in years, months, and days. Service years are only calculated if there is a value in the ASD field. Service Years are calculated using today's date as the End Date, if the employee has no break in service. If there is a break in service, the calculation factors in the effective date of the last termination and then uses today's date as the End Date.

Prior Service History: A record of each segment of state service separated by a termination. If an employee has not had a break in service, no information should be entered into this section. *If there has been a break in service:* All previous periods of state employment need to be entered here. Each record should specify if the service was Career Service, Accruing Leave, and URS Eligible. This is marked by checking the appropriate indicators within the record. By having the previous service entered, the system will calculate the ASD to accurately reflect total service time. This section will only calculate up to 5 entries, any more than that will not be included in the calculation.

Leave Accrual Exemption History: A record of each segment of benefit eligibility after being eligible for benefits. Entry here does not affect any service dates or automatic calculations but is for reference only. If an employee had periods of time in a position that made them temporarily ineligible for benefits, you will enter that service time into this section. By doing so, you create a record of those times in HRE for future manual calculation of benefitted time. If an employee has not had a break in service, no information should be entered into this section.

HR Docs

The following Documents should be uploaded to HR Docs:

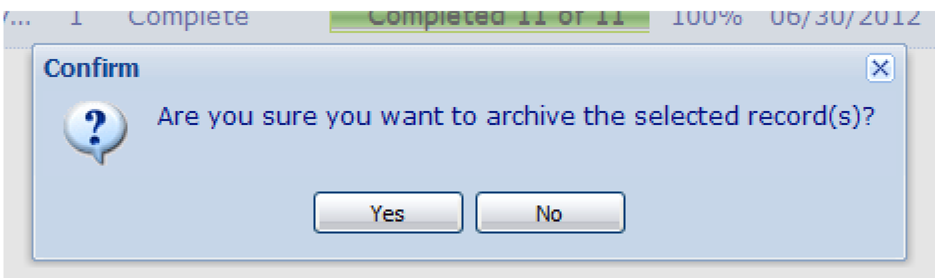
- Form I-9
- Acknowledgement Summary
- Overtime Compensation Agreement Form
- W4
- URS Certification
- Social Security Card
- Direct Deposit form (If Needed)

You are responsible for uploading the URS Certification. If we receive the Social Security Card and/or the Direct Deposit form, please upload those to HR Docs as well. All other documents should upload from Enwisen once the employee completes the Tours.

Archiving Tours

When the employee's Onboarding is complete and sent to HRE, you may Archive the employee's tours. This moves the tours out of the Admin Console and removes them from the Recruiter Console. To archive:

- Look up your employee in the Admin Console
- Click on the check box next to each tour
- Click Archive
- A Confirmation box will appear asking if you want to archive the selected record(s), click Yes



Deleting Temporary Documents from the R Drive

After uploading the URS Certification, Social Security Card and any other documents into HR Docs, you will need to delete those documents from where you saved them on the R or your local hard drive. Once they are in HR Docs, there is no need to keep them in any other location.

Tips/FAQs/Helps/Troubleshooting

- Don’t be afraid to ask!
- Don’t forget to make your benefit outreach calls and create cases to document contact
-